

EXHIBIT 2

Part 11



User Name: T8PVBDU

Date and Time: Monday, October 22, 2018 12:04:00 PM EDT

Job Number: 75986242

Documents (50)

1. 10 Cool Dips for Hot Summer Parties

Client/Matter: 23756-1001

Search Terms: "pretzel crisps" or "pretzel crisp" or pretzelcrisp

Search Type: Terms and Connectors

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News

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Timeline: Apr 21, 2012 to Dec 31, 2018

2. 10 Cool Dips for Hot Summer Parties

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3. Pretzel Logic: Federal Circuit Holds That TTAB Failed To Consider Mark As A Whole

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4. United States: Pretzel Logic: Federal Circuit Holds That TTAB Failed To Consider Mark As A Whole

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News	Timeline: Apr 21, 2012 to Dec 31, 2018

6. Snyder's-Lance, Inc. Selects Horizon Media as its Media Agency of Record for Four of its Core Brands; Horizon awarded media planning and activation duties after competitive review

Client/Matter: 23756-1001

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7. Horizon Snaps Up Snack Maker Snyder's-Lance

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9. Snyder's-Lance hires new media agency

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10. United States: What Are Crisps?

Client/Matter: 23756-1001

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11. What are 'Crisps'?

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13. One Legal Standard For Generic Analysis, Whether Trademark Is A Compound Term Or A Phrase

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15. Cape Cod® Will Stash \$60,000 into Bags of Potato Chips This Summer;12 Winners Will Find \$5,000 in Bags of Cash Giveaway Beginning May 25

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16. Troutman Sanders Federal Circuit Review - May 21, 2015

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18. "Frito-Lay loses battle over rival's 'Pretzel Crisps' name"

Client/Matter: 23756-1001

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19. 5 tips for stress-free traveling on a gluten-free diet

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21. 5 tips for stress-free traveling on a gluten-free diet

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26. Q1 2015 Snyder'sLance Inc Earnings Call - Final

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27. *Snyders-Lance 1Q EPS 15c >LNCE

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28. FORM 8-K: SNYDER'S-LANCE, INC FILES Current report

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29. Snyder's-Lance Q1 earnings miss Wall Street expectations

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30. Snyder's-Lance Reports Results for First Quarter 2015

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31. PDIC promotes environment protection through benefit run

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32. Press Release: Snyder's-Lance, Inc. Announces Results from Annual Meeting of Stockholders

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33. Snyder's-Lance, Inc. Announces Results from Annual Meeting of Stockholders

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34. Food & Beverage - North America

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35. Some on-the-go snacks

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36. Court Dismisses Injunctive Relief Claim Allows Others to Proceed

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37. A clear-eyed look at marijuana legalization

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38. Barcott takes clear-eyed look at marijuana legalization

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40. Level up everyday adventures with Pretzel Crisps

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41. Food Notes

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42. a 'quite pleasurable' read on legal weed

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43. Press Release: Snyder's-Lance, Inc. to Release First Quarter 2015 Results on Friday, May 8, Before Market Opens. Will Host Conference Call and Webcast at 9:00 am Eastern on Friday, May 8.

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45. The stat pool: the grocery headquarters annual State of the Industry Almanac takes a comprehensive look at dozens of supermarket categories;STATE OF THE INDUSTRY ALMANAC 2015

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46. The stat pool: the grocery headquarters annual State of the Industry Almanac takes a comprehensive look at dozens of supermarket categories.(STATE OF THE INDUSTRY ALMANAC 2015)

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47. Lauren's Un-Perfect Life

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48. United Airlines Updates United Clubs

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49. March 11, 2015, Snyder's-Lance Adds Cape Cod, Snack Factory Pretzel Crisps, Eatsmart Naturals and Lance to its Product Lineup

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50. Snyder's-Lance expands portfolio of gluten-free snacks

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6

10 Cool Dips for Hot Summer Parties

The Daily American (Somerset, Pennsylvania)

June 1, 2015 Monday

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Section: PARADE HEALTH

Length: 466 words

Byline: Becca Thiele

Dateline: Somerset, PA

Body

One of my life's mottos is "Every party needs a tasty dip." It seems that every party needs a little time for chatting or munching to ensure that all the main courses are done at the same time. It seems like a lot of work, but have no fear – it's cool and creamy dips to the rescue! Made from simple ingredients that are probably in your own pantry, all of these delicious dip recipes come together in just minutes. It won't be long before you're dipping to your heart's content! Of course, you'll need something to dip with; my favorite dippers include tortilla chips, **pretzel crisps**, fresh veggies, wheat thin crackers, bagel chips, potato chips and sliced baguettes...pick up a variety and get munching!

1 of 10 Crumbs and ChaosGarlic Feta DipPerfect for **pretzel crisps** or fresh veggies, Garlic Feta Dip is super flavorful and ideal for any occasion. Get the recipe here. 2 of 10 Lemon Tree DwellingCobb DipAll of the things you love about the salad, in a tasty dip-able form. Grab some **pretzel crisps** to enjoy this easy-to-make dip! Get the recipe here. 3 of 10 Crumbs and ChaosSalsa Verde Taco DipThis lovely layered goodness is going to go fast...make sure you have plenty of tortilla chips on hand! Get the recipe here. 4 of 10 Garnish With LemonParmesan SalsaThis cheese lover's delight comes together quickly with the help of a food processor. A few hours in the fridge and this cheesy dip is ready to spread on a fresh baguette! Get the recipe here. 5 of 10 Crumbs and ChaosCheesy Bacon Corn DipFull of everything good in life, this crowd-pleasing dip is a savory reminder that bacon really does make everything better. Get the recipe here. 6 of 10 Crumbs and ChaosApricot Gorgonzola Cheese SpreadThis unique blend of ingredients is fresh and delicious, making this spread a huge hit at parties! Get the recipe here. 7 of 10 Taste and TellBacon Horseradish DipWhy buy from the store when you can make this delectable dip at home? This creamy dip is just begging for a rippled potato chip. Get the recipe here. 8 of 10 Crumbs and ChaosDill Pickle DipYou may want to make double of this recipe...not only is it a crowd favorite, but it also makes a great burger topping. Get the recipe here. 9 of 10 Lemons for LuluBlue Cheese Ranch DipBursting with flavor, this cheesy dip is a cool accompaniment to your favorite spicy chips. Get the recipe here. 10 of 10AdvertisementDon't Miss Galleries:Style Steals: 6 Fall Scarves For \$20 Or Less6 photosHalloween Starts Today... on ABC35 photosApples, Apples, Apples! 21 Recipes to Fall For!20 photosReplay GallerySee AllPrevNext

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10 Cool Dips for Hot Summer Parties

The Herald-Mail (Hagerstown, Maryland)

June 1, 2015 Monday

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Section: ENTERTAINMENT

Length: 466 words

Byline: Becca Thiele

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Pretzel Logic: Federal Circuit Holds That TTAB Failed To Consider Mark As A Whole

Mondaq

May 28, 2015 Thursday 4:13 PM EST

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Length: 535 words

Byline: Mr Michael Boudett

Body

May 28, 2015(Mondaq: <http://mondaq.com/> Delivered by Newstex) <nl/> An application to register **PRETZEL CRISPS** as a mark will live another day, thanks to a Federal Circuit opinion[1] reversing a TTAB decision that had canceled the mark on grounds of genericness.<nl/> <nl/>

The holder of the **PRETZEL CRISPS** mark, Princeton Vanguard, originally applied to register it in 2004. Not surprisingly, Princeton was diverted to the Supplemental Register given the non-distinctive nature of the mark. It later followed the standard practice of re-applying for the Principal Register based on acquired distinctiveness. At that point, however, snack titan Frito-Lay stepped in: it opposed the application, and then filed an action to cancel the existing supplemental registration.<nl/><nl/>Frito-Lay prevailed in the TTAB. The Board held that the mark consisted of two words, each of which referred to a genus of goods ("pretzels" referring to pretzels and pretzel snacks, and "crisps" referring to crackers).<nl/><nl/>Not so, held the Federal Circuit. It admonished the Board for misconstruing its precedents: although some of its cases did look at individual terms comprising the mark (such as in the Gould case, which involved the proposed mark SCREENWIPE), the overall inquiry always involves the mark as a whole. Since the Board did not do this with respect to the combined term **PRETZEL CRISPS**, the Board committed legal error, and the case was reversed and remanded.<nl/><nl/>The Federal Circuit went on to make some interesting observations about the Board's weighing of evidence on remand. It noted that each side had submitted a survey addressing the question of whether the consuming public viewed the mark as a brand name or as a category name. The Board appeared to have treated the two surveys as "canceling each other out" even though its opinion only agreed with criticisms of Frito-Lay's survey. In other words, the Federal Circuit was left with no reason why Princeton's survey mdash; which found that 55% of respondents thought **PRETZEL CRISPS** was a brand name, and only 36% thought it was a common or generic name mdash; would not be persuasive evidence of registrability. The Board will have some explaining to do on this issue.<nl/><nl/>To view Foley Hoag's Trademark and Copyright Law Blog please click here[2]<nl/><nl/>The content of this article is intended to provide a general guide to the subject matter. Specialist advice should be sought about your specific circumstances.<nl/><nl/> Mr Michael Boudett<nl/>Foley Hoag LLP<nl/>155 Seaport Boulevard<nl/>Boston<nl/>02210<nl/>UNITED STATES<nl/> Tel: 6178321000<nl/>Fax: 617 8327000<nl/><nl/>E-mail: JTrillos-Decarie@foleyhoag.com;<nl/>URL: www.foleyhoag.com<nl/><nl/>Click Here [3] for related articles (c) Mondaq Ltd, 2015 - Tel. +44 (0)20 8544 8300 - <http://www.mondaq.com>[4]<nl/> [1]: <http://business.cch.com/ipld/PrincetonVanguardFritoLayNorthAmerica.pdf> [2]; http://www.mondaq.com/redirection.asp?article_id=400738...pany_id=20771...irectaddress=http%3A//www.tradema rkandcopyrightlawblog.com/ [3]; http://www.mondaq.com/search/relate.asp?article_id=400738...ine_host_id=0 [4]; http://www.mondaq.com/default.asp?online_host_id=22...400738

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United States: Pretzel Logic: Federal Circuit Holds That TTAB Failed To Consider Mark As A Whole

Mondaq Business Briefing

May 28, 2015 Thursday

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Length: 422 words

Byline: Michael Boudett

Body

An application to register **PRETZEL CRISPS** as a mark will live another day, thanks to a Federal Circuit opinion reversing a TTAB decision that had canceled the mark on grounds of genericness.

The holder of the **PRETZEL CRISPS** mark, Princeton Vanguard, originally applied to register it in 2004. Not surprisingly, Princeton was diverted to the Supplemental Register given the non-distinctive nature of the mark. It later followed the standard practice of re-applying for the Principal Register based on acquired distinctiveness. At that point, however, snack titan Frito-Lay stepped in: it opposed the application, and then filed an action to cancel the existing supplemental registration.

Frito-Lay prevailed in the TTAB. The Board held that the mark consisted of two words, each of which referred to a genus of goods ("pretzels" referring to pretzels and pretzel snacks, and "crisps" referring to crackers).

Not so, held the Federal Circuit. It admonished the Board for misconstruing its precedents: although some of its cases did look at individual terms comprising the mark (such as in the Gould case, which involved the proposed mark SCREENWIPE), the overall inquiry always involves the mark as a whole. Since the Board did not do this with respect to the combined term **PRETZEL CRISPS**, the Board committed legal error, and the case was reversed and remanded.

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To view Foley Hoag's Trademark and Copyright Law Blog please click [here](#)

The content of this article is intended to provide a general guide to the subject matter. Specialist advice should be sought about your specific circumstances.

Mr Michael Boudett

United States: Pretzel Logic: Federal Circuit Holds That TTAB Failed To Consider Mark As A Whole

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URL: www.foleyhoag.com

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Pretzel Logic: Federal Circuit holds that TTAB Failed to Consider Mark as a Whole

JD Supra

May 28, 2015 Thursday 2:05 PM EST

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Length: 116 words

Byline: Foley Hoag LLP - Trademark, Copyright

Body

May 28, 2015(JD Supra: <http://www.jdsupra.com> Delivered by Newstex) <nl/> Contributor: Foley Hoag LLP - Trademark, Copyright ...iew: Profile[1] | Documents[2]<nl/>Publication Date: 05/28/2015 Document Type: Article/Newsletter Subject Matter: Civil Procedure, Communications ...dia Law, Intellectual Property Summary: An application to register **PRETZEL CRISPS** as a mark will live another day, thanks to a Federal Circuit opinion reversing a TTAB decision that had canceled the mark on grounds of genericness.<nl/> [1]: http://www.jdsupra.com/profile/foley_hoag_trademark_copyright_unfair_competition/ [2]: http://www.jdsupra.com/profile/foley_hoag_trademark_copyright_unfair_competition_docs/

Load-Date: May 28, 2015

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Snyder's-Lance, Inc. Selects Horizon Media as its Media Agency of Record for Four of its Core Brands; Horizon awarded media planning and activation duties after competitive review

PR Newswire

May 27, 2015 Wednesday 8:57 AM EST

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Length: 731 words

Dateline: NEW YORK, May 27, 2015

Body

Horizon Media, the largest and fastest growing privately held media services agency in the world, announced today that Snyder's-Lance, one of the largest savory snack makers in the United States, has named the agency's New York office as its media agency of record (AOR) for four of its core brands. The agency has been awarded all core communications planning and activation responsibilities for the U.S. market for Snyder's-Lance brands - Snyder's of Hanover®, Lance®, Cape Cod® and Snack Factory® Pretzel Crisps®.

"We are thrilled to welcome Snyder's-Lance to the Horizon Media family," said Peggy McCann, SVP, Managing Director, Horizon Media. "Snyder's-Lance is an innovative company, with a focus on brands that meet consumers' evolving needs in the snack category. We are eager to employ our strategic planning and investment approach towards the Snyder's-Lance growing portfolio of brands."

Horizon Media was awarded the business after a highly competitive review, and has been charged with managing all media planning for Snyder's-Lance's core brands. Horizon will collaborate closely with the creative agency in order to plan towards marketing communications that will focus on Snyder's-Lance's transformation as it becomes the trusted consumer choice in snacking, including "better for you" snacking options for its four largest brands. Horizon Media's first work for Snyder's-Lance will launch in Spring 2015.

"We're driven by insights and innovation through an understanding about the role snack foods play in consumers' lives, and a clear vision for each brand," said Rod Troni, Chief Marketing Officer at Snyder's-Lance. "Horizon was the clear choice for Snyder's-Lance because the agency is powered by an inventive mindset and has exhibited a proven ability to deliver results efficiently across a complex media environment."

Snyder's-Lance, Inc., headquartered in Charlotte, N.C., manufactures and markets snack foods throughout the United States and internationally. Snyder's-Lance's products include pretzels, sandwich crackers, pretzel crackers, potato chips, cookies, tortilla chips, restaurant style crackers, nuts and other snacks. Snyder's-Lance has manufacturing facilities in North Carolina, Pennsylvania, Indiana, Georgia, Arizona, Massachusetts, Florida, Wisconsin and Ohio. Products are sold under the Snyder's of Hanover®, Lance®, Cape Cod®, Snack Factory® Pretzel Crisps®, Late July®, Krunchers!®, Tom's®, Archway®, Jays®, Stella D'oro®, EatsmartSnacks(TM), O-Ke-Doke® and other brand names. Products are distributed nationally through grocery and mass merchandisers, convenience stores, club stores, food service outlets and other channels.

About Horizon Media

Horizon Media, Inc. is the largest and fastest growing privately held media services agency in the world. The company was founded in 1989, is headquartered in New York and has offices in Los Angeles, San Diego, and Chicago. Horizon Media was chosen as 2011 Independent Media Agency of the Year by Mediapost, 2010 U.S. Media Agency of the Year by Adweek, Brandweek, and Mediaweek as well as by Ad Age and as one of the world's

Snyder's-Lance, Inc. Selects Horizon Media as its Media Agency of Record for Four of its Core Brands; Horizon awarded media planning and activation duties after....

ten most innovative marketing and advertising companies by Fast Company in 2011. In 2012, Bill Koenigsberg, President, CEO and Founder, was honored by Advertising Age as Industry Executive of the Year. Most recently, in 2014, Bill Koenigsberg was named 4As Chair of the Board and is the first person from a media agency to hold this prestigious position in the 100 year history of the 4As, the marketing industry's leading trade association.

The company's mission is "To create the most meaningful brand connections within the lives of people everywhere." By delivering on this mission through a holistic approach to brand marketing, Horizon Media has become one of the largest and fastest-growing media agencies in the industry, with estimated billings of over \$5.2 billion and over 1100 employees.

The company is also a founding member of Columbus Media International, a multi-national partnership of independent media agencies. For more information, please visit horizonmedia.com.

Contact

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To view the original version on PR Newswire, visit:<http://www.prnewswire.com/news-releases/snyders-lance-inc-selects-horizon-media-as-its-media-agency-of-record-for-four-of-its-core-brands-300089126.html>

SOURCE Horizon Media

Load-Date: June 2, 2015

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Horizon Snaps Up Snack Maker Snyder's-Lance

MediaPost.com

May 27, 2015

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Length: 257 words

Body

Snack maker Snyder's-Lance has named Horizon Media as media agency of record for four of its core brands: Snyder's of Hanover, Lance, Cape Cod, and Snack Factory Pretzel Chips.

The company spent \$30.4 million on advertising in 2013, up from \$24.2 million and \$20.1 million in 2012 and 2011, respectively, according to a recent financial statement.

Horizon will oversee all core communications planning and buying/activation responsibilities in the U.S. The agency's New York office will manage the account and will work with the company's creative agency Barton F. Graf 9000.

With its agencies the client is developing a marketing communications plans designed to persuade consumers that it provides "better for you" snacking options.

Horizon Media was awarded the business after a competitive review. The incumbent GKV of Baltimore had managed all of the brands, except for **Pretzel Crisps**.

"We're driven by insights and innovation through an understanding about the role snack foods play in consumers' lives and a clear vision for each brand." said Rod Troni, chief marketing officer at Snyder's-Lance. "Horizon was the clear choice for Snyder's-Lance because the agency is powered by an inventive mindset and has exhibited a proven ability to deliver results efficiently across a complex media environment."

In addition to the brands cited above, Snyder's-Lance, headquartered in Charlotte, N.C., manufactures and markets snack foods under the Late July, Krunchers!, Tom's, Archway, Jays, Stella D'oro, EatsmartSnacks, O-Ke-Doke labels, among others.

Notes

PUBLISHER: MediaPost Communications

Load-Date: May 28, 2015

Horizon Snaps Up Snack Maker Snyder's-Lance

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Horizon Snaps Up Snack Maker Synder's-Lance

MediaPost.com

May 27, 2015

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Notes

PUBLISHER: MediaPost Communications

Load-Date: November 18, 2015

Horizon Snaps Up Snack Maker Synder's-Lance

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Snyder's-Lance hires new media agency

Charlotte Observer (North Carolina)

May 27, 2015 Wednesday

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The Charlotte Observer

Found on Charlotte.com

Section: business

Length: 169 words

Byline: Katherine Peralta

The Charlotte Observer

Body

Charlotte-based Snyder's-Lance has named Horizon Media as its agency of record for four of its core brands as it hones its focus on the healthy snack market.

Horizon, based in New York, will spearhead media planning and communications for the U.S. market for Snyder's of Hanover, Lance, Cape Cod and Snack Factory **Pretzel Crisps**, the two companies said in a released Wednesday.

Horizon's media work for the local snackmaker will begin this spring.

"The agency is powered by an inventive mindset and has exhibited a proven ability to deliver results efficiently across a complex media environment," said Rod Troni, chief marketing officer at Snyder's-Lance, in the statement.

The two companies said Horizon will focus on Snyder's-Lance's "transformation" as it focuses on "better for you" snacks. Last year, which the snackmaker's CEO Carl Lee has called "," included a number of deals for Snyder's-Lance as it expanded its foothold in the healthier snack market to meet evolving consumer demands.

Peralta: 704-358-5079;

Load-Date: May 27, 2015

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United States: What Are Crisps?

Mondaq Business Briefing

May 26, 2015 Tuesday

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mondaq

Length: 1583 words

Byline: Jack Wheat

Body

England and America are two countries separated by a common language.

-George Bernard Shaw

How true, how true. Take the word "lift" for instance. Here in America, that's what I do when I go pick up my longtime partner and friend, Joel Beres, at his condominium to give him a "lift" to a University of Louisville football game. To our British friends though, a "lift" is an elevator.

Speaking of Joel's apartment style condominium, across the pond, the Brits would refer to that as "flat" which to us American's is the word we would use to refer to a deflated automobile tire, or in the case of the New England Patriots National Football League team, a deflated football. This of course brings to mind that "football" in England means the sport we call "soccer." (Well at least the game Brits refer to as "Rugby" is the same game we too refer to by that name, I think.)

In locating the precise wording of the famous George Bernard Shaw quote reproduced above about being "separated by a common language," I even came across a blog, the ongoing theme of which is this very subject - <http://separatedbyacommonlanguage.blogspot.com/>

And then there are those compartments in the rear of automobiles. We refer to them as "trunks." To the British they are "boots," whereas "boots" to us are the footwear of tall Texans and cowboys, or wannabes thereof.

Speaking of boots, tall Texans, wannabes, and the differing meanings of words depending on the perspective of the speaker again brings to mind Joel Beres, my longtime partner in friend mentioned above. Although I was raised here in Louisville and achieved the height of 6 feet, 2 inches, I was actually born in Ft. Worth, Texas. Joel was born in Montana, educated at Stanford and UCLA and began the practice of law in Los Angeles before fulfilling his lifelong dream to relocate to Louisville to become a Kentucky Lawyer. Whereas I truthfully can be referred to as a tall Texan, Joel claims to be of "average" height. Please judge for yourself from this photo below taken when we travelled last Fall to the University of Louisville football game at Notre Dame.

I'm the tall Texan on the left and Joel is the "average" height guy on the right. (By the way, we're both wearing our cowboy boots, me because I'm a Texan and Joel because he just wants to.)

Boots, Joel, and I really have nothing to do with the point of this blog. That aside was merely my attempt at some humor, or what our British friends would call humour. Back to the point of this blog though, what does all this

United States: What Are Crisps?

"separated by a common language" musing have to do with the subject at hand? Very little actually other than the ponderings in my mind relating to an important American trademark law case that came down this week relating to whether the product name PRETZEL CHIPS may be protected as a trademark. See Princeton Vanguard, LLC v. Frito-Lay North America, Inc., No. 2014-1517, slip opinion (Fed. Cir. May 15, 2015). The decision may be accessed at <http://www.cafc.uscourts.gov/images/stories/opinions-orders/14-1517.Opinion.5-13-2015.1.PDF> Here is a photograph of the product in issue.

The issue in this case relates to whether the name **PRETZEL CRISPS** is unique enough to be a trademark for pretzel crackers, or is it too generic of a reference to serve as a trademark. As the United States Court of Appeals reminds us in this case, to be protectable as a trademark, a product name must be unique enough to indicate a particular source of a product, whereas a generic term is a "common descriptive name of a class of goods or services" which is "by definition incapable of indicating a particular source of the goods or services." The common example I use with my clients is "grocery store," a common descriptive reference that, by itself does nothing to indicate a particular grocery store brand, rather it is the "common descriptive name of a class of . . . services," thus it is a "generic" reference. Because it is generic, everyone who operates a grocery store can call it just that, a grocery store. What makes a grocery store name protectable as a trademark is if something distinctive is joined with the grocery store reference, for instance a KROGER® Grocery Store, or an ALBERTSONS® Grocery Store.

So what does this mean in relation to whether **PRETZEL CRISPS** can be protected as a trademark for pretzel crackers? The word "pretzel," of course, is a generic reference to pretzel crackers; so the real issue is whether the addition of the word "crisps" adds adequate uniqueness. to the reference.

So before I even read the decision in this case, I asked myself, "What are Crisps?" And that's why I've been musing about how, in the words of George Bernard Shaw, "England and America are two countries separated by a common language."

Take the word "chips." In America a common meaning of "chips" is those thin cooked salty slices of potatoes or corn meal such as the LAY'S® and RUFFLES® brand potato chips, or the FRITO® and DORITOS® brand corn chips marketed by the Frito-Lay Company.

"Chips" in England though is the common reference to what we Americans call French fries, a British use perhaps best known worldwide in relation to "fish and chips." Rather than use the word "chips" like we do in America, Brits refer to small thin salty snacks such as potato chips as "crisps."

Although it has little to do with the question of what does the reference **PRETZEL CRISPS** mean to an American consumer, all these musings of mine remind me of my eldest daughter Aston who is putting her University of Louisville Masters of Business Administration degree to good use in her marketing career as an employee of the Frito-Lay Company. What she discovered while she was doing a study abroad in Greece is that what Americans call "chips," and what British call "crisps" are what Greeks apparently call Στο Φούρυ. Here how I know that:

Back on point though, in relation to the **PRETZEL CRISPS** case, a question one must ask is whether this reference is perceived here in America to be unique enough to indicate a particular source of a product, or is it merely a "common descriptive name of a class of goods."

So what do the words "crisp" or "crisps" mean? My dictionary reference says the word "crisp" is an adjective of various meanings such as "dry and brittle," or "fresh and firm" ("crisp lettuce"), or "clear and sharp" ("crisp reasoning"). My dictionary also points out that although the word is an adjective, it also has a British meaning, namely the thin salty snacks such as what we call potato chips. So we've come full circle, a thin salty snack in America is a "chip," in England, it is a "crisp," or "crisps."

In the **PRETZEL CRISPS** case, the Trademark Trial and Appeal Board (the TTAB) which is a judicial branch of the United States Patent & Trademark Office noted that the word PRETZEL is generic, of course, for pretzel products and went on to hold that the word CRISPS is generic for crackers. So combining both words to use as a name for pretzel crackers is generic and thus not protectable as a trademark. The TTAB reasoning on the meaning is "crisps" puzzles me a bit. To get there, the TTAB referred to a dictionary definition of "crisp" as something "easily crumbled"

United States: What Are Crisps?

or "brittle" such as "a crisp cracker." To that I say, yes, crackers may be crisp, but so is lettuce. If the TTAB rationale is right, than I guess "Crisps" could also mean "lettuce." I wonder if the TTAB went a bit far declaring the American adjective "crisp" to now be a noun, a word synonymous with "crackers." A wordsmith could play this game with most any adjective. Take, for instance, the word "cool" which means chilled in relation to beverages, for instance a "cool beverage." If the TTAB's reasoning is correct, then the word "cool" must also now mean "beverage." I think not.

In reviewing this decision on appeal, the United States Court of Appeals for the Federal Circuit did not totally agree with the rationale of the TTAB. Indeed, the Federal Circuit noted the survey evidence submitted to the TTAB did not necessarily fully support the TTAB finding that **PRETZEL CRISPS** is a generic reference to pretzel crackers. The Federal Circuit vacated the TTAB ruling that **PRETZEL CRISPS** is generic and returned the case to the TTAB with instructions to reconsider its ruling and to focus on what is the "relevant public's understanding of the term **PRETZEL CRISPS**" as a whole.

In my view, if the relevant public were consumers in England, the name might clearly be generic. I'm not so certain about the relevant public in America. The relevant public in America may well perceive **PRETZEL CRISPS** as a product name unique enough to indicate a particular source of a product, not as a "common descriptive name of a class of goods" which is "incapable of indicating a particular source of the goods or services."

So the case is returning back to the TTAB for a re-do. Stay tuned . . . and keep your boots on.

The lawyers at Trademarkology provide trademark registration services backed by the experience and service of one of the nation's oldest law firms. Click [here](#) to begin the process of protecting your brand name with a federally registered trademark.

The content of this article is intended to provide a general guide to the subject matter. Specialist advice should be sought about your specific circumstances.

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Load-Date: May 26, 2015

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What are 'Crisps'?

Trademarkology

May 26, 2015 Tuesday 6:47 AM EST

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Length: 1674 words

Byline: Jack Wheat

Body

May 25, 2015(Trademarkology: <http://www.trademarkologist.com/> Delivered by Newstex) <nl/> England and America are two countries separated by a common language.<nl/> -George Bernard Shaw<nl/> How true, how true. Take the word 'lift' for instance.

Here in America, that's what I do when I go pick up my longtime partner and friend, Joel Beres, at his condominium to give him a 'lift' to a University of Louisville football game. To our British friends though, a 'lift' is an elevator.<nl/> Speaking of Joel's apartment style condominium, across the pond, the Brits would refer to that as 'flat' which to us American's is the word we would use to refer to a deflated automobile tire, or in the case of the New England Patriots National Football League team, a deflated football. This of course brings to mind that 'football' in England means the sport we call 'soccer.' (Well at least the game Brits refer to as 'Rugby' is the same game we too refer to by that name, I think.)<nl/> In locating the precise wording of the famous George Bernard Shaw quote reproduced above about being 'separated by a common language,' I even came across a blog, the ongoing theme of which is this very subject — <http://separatedbyacommonlanguage.blogspot.com/>[1]<nl/> And then there are those compartments in the rear of automobiles. We refer to them as 'trunks.' To the British they are 'boots,' whereas 'boots' to us are the footwear of tall Texans and cowboys, or wannabes thereof.<nl/> <http://www.trademarkologist.com/files/2015/05/car.jpg><http://www.trademarkologist.com/files/2015/05/boot.jpg><nl/> Speaking of boots, tall Texans, wannabes, and the differing meanings of words depending on the perspective of the speaker again brings to mind Joel Beres, my longtime partner in friend mentioned above. Although I was raised here in Louisville and achieved the height of 6 feet, 2 inches, I was actually born in Ft. Worth, Texas. Joel was born in Montana, educated at Stanford and UCLA and began the practice of law in Los Angeles before fulfilling his lifelong dream to relocate to Louisville to become a Kentucky Lawyer. Whereas I truthfully can be referred to as a tall Texan, Joel claims to be of 'average' height. Please judge for yourself from this photo below taken when we travelled last Fall to the University of Louisville football game at Notre Dame.<nl/> <http://www.trademarkologist.com/files/2015/05/jack-and-joel.jpg><nl/> I'm the tall Texan on the left and Joel is the 'average' height guy on the right. (By the way, we're both wearing our cowboy boots, me because I'm a Texan and Joel because he just wants to.)<nl/> Boots, Joel, and I really have nothing to do with the point of this blog. That aside was merely my attempt at some humor, or what our British friends would call humour. Back to the point of this blog though, what does all this 'separated by a common language' musing have to do with the subject at hand? Very little actually other than the ponderings in my mind relating to an important American trademark law case that came down this week relating to whether the product name PRETZEL CHIPS may be protected as a trademark. See Princeton Vanguard, LLC v. Frito-Lay North America, Inc., No. 2014-1517, slip opinion (Fed. Cir. May 15, 2015). The decision may be accessed at <http://www.cafc.uscourts.gov/images/stories/opinions-orders/14-1517.Opinion.5-13-2015.1.PDF>[2] Here is a photograph of the product in issue.<nl/> <http://www.trademarkologist.com/files/2015/05/pretzel-crisps.png><nl/> The issue in this case relates to whether the name PRETZEL CRISPS is unique enough to be a trademark for pretzel crackers, or is it too generic of a reference to serve as a trademark. As the United States Court of Appeals reminds us in this case, to be protectable as a trademark, a product name must be unique enough to indicate a particular source of a product, whereas a generic term is a 'common descriptive name of a class of goods or services' which is 'by definition incapable of indicating a

What are 'Crisps'?

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<http://separatedbyacommonlanguage.blogspot.com/> [2]:

What are 'Crisps'?

<http://www.cafc.uscourts.gov/images/stories/opinions-orders/14-1517.Opinion.5-13-2015.1.PDF> [3]:
<http://www.trademarkologist.com/contact/>

Load-Date: May 26, 2015

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What Are "Crisps"?

Mondaq

May 26, 2015 Tuesday 2:10 PM EST

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Length: 1736 words

Byline: Mr Jack Wheat

Body

May 26, 2015(Mondaq: <http://mondaq.com/> Delivered by Newstex) <nl/> England and America are two countries separated by a common language.<nl/><nl/>-George Bernard Shaw<nl/><nl/>How true, how true.

Take the word "lift" for instance. Here in America, that's what I do when I go pick up my longtime partner and friend, Joel Beres, at his condominium to give him a "lift" to a University of Louisville football game. To our British friends though, a "lift" is an elevator.<nl/><nl/>Speaking of Joel's apartment style condominium, across the pond, the Brits would refer to that as "flat" which to us American's is the word we would use to refer to a deflated automobile tire, or in the case of the New England Patriots National Football League team, a deflated football. This of course brings to mind that "football" in England means the sport we call "soccer." (Well at least the game Brits refer to as "Rugby" is the same game we too refer to by that name, I think.)<nl/><nl/>In locating the precise wording of the famous George Bernard Shaw quote reproduced above about being "separated by a common language," I even came across a blog, the ongoing theme of which is this very subject — [http://separatedbyacommonlanguage.blogspot.com/\[1\]](http://separatedbyacommonlanguage.blogspot.com/[1])<nl/><nl/>And then there are those compartments in the rear of automobiles. We refer to them as "trunks." To the British they are "boots," whereas "boots" to us are the footwear of tall Texans and cowboys, or wannabes thereof.<nl/><nl/><nl/>Speaking of boots, tall Texans, wannabes, and the differing meanings of words depending on the perspective of the speaker again brings to mind Joel Beres, my longtime partner in friend mentioned above. Although I was raised here in Louisville and achieved the height of 6 feet, 2 inches, I was actually born in Ft. Worth, Texas. Joel was born in Montana, educated at Stanford and UCLA and began the practice of law in Los Angeles before fulfilling his lifelong dream to relocate to Louisville to become a Kentucky Lawyer. Whereas I truthfully can be referred to as a tall Texan, Joel claims to be of "average" height. Please judge for yourself from this photo below taken when we travelled last Fall to the University of Louisville football game at Notre Dame.<nl/><nl/><nl/>I'm the tall Texan on the left and Joel is the "average" height guy on the right. (By the way, we're both wearing our cowboy boots, me because I'm a Texan and Joel because he just wants to.)<nl/><nl/>Boots, Joel, and I really have nothing to do with the point of this blog. That aside was merely my attempt at some humor, or what our British friends would call humour. Back to the point of this blog though, what does all this "separated by a common language" musing have to do with the subject at hand? Very little actually other than the ponderings in my mind relating to an important American trademark law case that came down this week relating to whether the product name PRETZEL CHIPS may be protected as a trademark. See Princeton Vanguard, LLC v. Frito-Lay North America, Inc., No. 2014-1517, slip opinion (Fed. Cir. May 15, 2015). The decision may be accessed at [http://www.cafc.uscourts.gov/images/stories/opinions-orders/14-1517.Opinion.5-13-2015.1.PDF\[2\]](http://www.cafc.uscourts.gov/images/stories/opinions-orders/14-1517.Opinion.5-13-2015.1.PDF[2]) Here is a photograph of the product in issue.<nl/><nl/><nl/>The issue in this case relates to whether the name **PRETZEL CRISPS** is unique enough to be a trademark for pretzel crackers, or is it too generic of a reference to serve as a trademark. As the United States Court of Appeals reminds us in this case, to be protectable as a trademark, a product name must be unique enough to indicate a particular source of a product, whereas a generic term is a "common descriptive name of a class of goods or services" which is "by definition incapable of indicating a particular source of the goods or services." The common example I use with my clients is "grocery store," a common descriptive reference that, by itself does nothing to indicate a particular grocery store brand, rather it is the "common descriptive name of a class of . . . services," thus it is a "generic" reference.

What Are "Crisps"?

Because it is generic, everyone who operates a grocery store can call it just that, a grocery store. What makes a grocery store name protectable as a trademark is if something distinctive is joined with the grocery store reference, for instance a KROGER® Grocery Store, or an ALBERTSONS® Grocery Store.<nl/><nl/>So what does this mean in relation to whether **PRETZEL CRISPS** can be protected as a trademark for pretzel crackers? The word "pretzel," of course, is a generic reference to pretzel crackers; so the real issue is whether the addition of the word "crisps" adds adequate uniqueness to the reference.<nl/><nl/>So before I even read the decision in this case, I asked myself, "What are Crisps?" And that's why I've been musing about how, in the words of George Bernard Shaw, "England and America are two countries separated by a common language."<nl/><nl/>Take the word "chips." In America a common meaning of "chips" is those thin cooked salty slices of potatoes or corn meal such as the LAY'S® and RUFFLES® brand potato chips, or the FRITO® and DORITOS® brand corn chips marketed by the Frito-Lay Company.<nl/><nl/>"Chips" in England though is the common reference to what we Americans call French fries, a British use perhaps best known worldwide in relation to "fish and chips." Rather than use the word "chips" like we do in America, Brits refer to small thin salty snacks such as potato chips as "crisps."<nl/><nl/>Although it has little to do with the question of what does the reference **PRETZEL CRISPS** mean to an American consumer, all these musings of mine remind me of my eldest daughter Aston who is putting her University of Louisville Masters of Business Administration degree to good use in her marketing career as an employee of the Frito-Lay Company. What she discovered while she was doing a study abroad in Greece is that what American's call "chips," and what British call "crisps" are what Greeks apparently call Στο Φούρυ. Here how I know that:<nl/><nl/><nl/>Back on point though, in relation to the **PRETZEL CRISPS** case, a question one must ask is whether this reference is perceived here in America to be unique enough to indicate a particular source of a product, or is it merely a "common descriptive name of a class of goods."<nl/><nl/>So what do the words "crisp" or "crisps" mean? My dictionary reference says the word "crisp" is an adjective of various meanings such as "dry and brittle," or "fresh and firm" ("crisp lettuce"), or "clear and sharp" ("crisp reasoning"). My dictionary also points out that although the word is an adjective, it also has a British meaning, namely the thin salty snacks such as what we call potato chips. So we've come full circle, a thin salty snack in America is a "chip," in England, it is a "crisp," or "crisps."<nl/><nl/>In the **PRETZEL CRISPS** case, the Trademark Trial and Appeal Board (the TTAB) which is a judicial branch of the United States Patent ...ademark Office noted that the word PRETZEL is generic, of course, for pretzel products and went on to hold that the word CRISPS is generic for crackers. So combining both words to use as a name for pretzel crackers is generic and thus not protectable as a trademark. The TTAB reasoning on the meaning is "crisps" puzzles me a bit. To get there, the TTAB referred to a dictionary definition of "crisp" as something "easily crumbled" or "brittle" such as "a crisp cracker." To that I say, yes, crackers may be crisp, but so is lettuce. If the TTAB rationale is right, than I guess "Crisps" could also mean "lettuce." I wonder if the TTAB went a bit far declaring the American adjective "crisp" to now be a noun, a word synonymous with "crackers." A wordsmith could play this game with most any adjective. Take, for instance, the word "cool" which means chilled in relation to beverages, for instance a "cool beverage." If the TTAB's reasoning is correct, then the word "cool" must also now mean "beverage." I think not.<nl/><nl/>In reviewing this decision on appeal, the United States Court of Appeals for the Federal Circuit did not totally agree with the rationale of the TTAB. Indeed, the Federal Circuit noted the survey evidence submitted to the TTAB did not necessarily fully support the TTAB finding that **PRETZEL CRISPS** is a generic reference to pretzel crackers. The Federal Circuit vacated the TTAB ruling that **PRETZEL CRISPS** is generic and returned the case to the TTAB with instructions to reconsider its ruling and to focus on what is the "relevant public's understanding of the term **PRETZEL CRISPS**" as a whole.<nl/><nl/>In my view, if the relevant public were consumers in England, the name might clearly be generic. I'm not so certain about the relevant public in America. The relevant public in America may well perceive **PRETZEL CRISPS** as a product name unique enough to indicate a particular source of a product, not as a "common descriptive name of a class of goods" which is "incapable of indicating a particular source of the goods or services."<nl/><nl/>So the case is returning back to the TTAB for a re-do. Stay tuned . . . and keep your boots on.<nl/><nl/>The lawyers at Trademarkology provide trademark registration services backed by the experience and service of one of the nation's oldest law firms. Click here[3] to begin the process of protecting your brand name with a federally registered trademark.<nl/><nl/>The content of this article is intended to provide a general guide to the subject matter. Specialist advice should be sought about your specific circumstances.<nl/><nl/> Mr Jack Wheat<nl/>Stites ...rbison PLLC<nl/>400 West Market Street<nl/>Suite 1800<nl/>Louisville<nl/>Kentucky<nl/>UNITED STATES<nl/> Tel: 5026810463<nl/>Fax: 5025876391<nl/><nl/>E-mail: info@stites.com;<nl/>URL: www.stites.com<nl/><nl/>Click Here [4] for related articles (c) Mondaq Ltd, 2015 - Tel. +44 (0)20 8544 8300 - http://www.mondaq.com[5]<nl/> [1]:

What Are "Crisps"?

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One Legal Standard For Generic Analysis, Whether Trademark Is A Compound Term Or A Phrase

Mondaq

May 26, 2015 Tuesday 4:17 PM EST

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Length: 675 words

Byline: Mr Joseph Robinson, Ryan A. Schneider, Robert Schaffer, Parker D. Hancock, John A. Morrisett and Tinh Nguyen

Body

May 26, 2015(Mondaq: <http://mondaq.com/> Delivered by Newstex) <nl/> Princeton Vanguard, LLC, v. Frito-Lay North America, Inc., No. 2014-1517, 2015 U.S. App. LEXIS 8002 (Fed. Cir. May 15, 2015) (O'Malley, J.). Click Here[1] for a copy of the opinion.<nl/>

<nl/>After successfully registered the trademark **PRETZEL CRISPS** for "pretzel crackers" on the Supplemental Register, Princeton Vanguard ("PV") applied for the Principal Register. Frito-Lay filed a notice of opposition to PV's application and a petition to cancel PV's Supplemental Registration. On summary judgment, the TTAB Board denied both parties' motions, "finding a genuine dispute as to whether the mark is generic for pretzel crackers and whether it had acquired distinctiveness." The parties then submitted trial briefs and the Board conducted oral argument.<nl/><nl/>Initially, the Board determined that **PRETZEL CRISPS** is a compound term and analyzed the words individually. Subsequently, the Board found that PRETZEL is generic for pretzels and pretzel snacks and that CRISPS is generic for crackers. Thus, **PRETZEL CRISPS** is generic for "pretzel crackers." The Board based its findings on media references, third party use of the term, dictionary definitions, and generic references to the combined term "**pretzel crisps**." Evidence also included expert surveys. However, the Board gave little weight to Frito-Lay's survey due to inherent flaws in the methodology. The Board also disregarded PV's survey but provided no explanation.<nl/><nl/>The issue on appeal was whether the Board applied the correct legal standard in evaluating whether the mark is generic. This requires a two-step inquiry: (1) "what is the genus of goods or services at issue" and (2) whether "the term sought to be registered or retained on the register is understood by the relevant public primarily to refer to that genus of goods or services." Whether the mark is a compound term or a phrase does not change this inquiry. Here, after concluding that **PRETZEL CRISPS** is a compound term, the Board did not "assess whether the public understands the mark, as a whole, to refer to that genus." The Court concluded that the Board applied the incorrect legal standard.<nl/><nl/>PV also argued that "the Board cherry-picked the media references in the record and chose only those references that supported genericness." The Court did not analyze the parties' arguments with respect to the evidence of record, but reiterated that "substantial evidence review 'requires an examination of the record as a whole, taking into account both the evidence that justifies and detracts from an agency's opinion.'" Because the Board disregarded PV's expert survey without any explanation, the Court required appropriate consideration be given to the proffered survey evidence on remand.<nl/><nl/>The content of this article is intended to provide a general guide to the subject matter. Specialist advice should be sought about your specific circumstances.<nl/><nl/> Mr Joseph Robinson<nl/>Troutman Sanders LLP<nl/>The Chrysler Building<nl/>405 Lexington Avenue<nl/>New York<nl/>NY 10174-0700<nl/>UNITED STATES<nl/> Tel: 8046971200<nl/>Fax: 8046971339<nl/><nl/>E-mail: Penny.egel@troutmansanders.com;<nl/>URL: www.troutmansanders.com<nl/><nl/>Click Here [2] for related articles (c) Mondaq Ltd, 2015 - Tel. +44 (0)20 8544 8300 - [http://www.mondaq.com\[3\]<nl/>](http://www.mondaq.com[3]<nl/>) [1]: https://urldefense.proofpoint.com/v2/url?u=https-3A__sites-2Dtroutmansanders.vulturevx.com_email-5Fhandler.aspx-3Fsid-3D9e7f23f1-2D4fed-2D449a-2D92df-2Dc272b045aa76-26redirect-3Dhttp-253a-252f-252fwww.cafc.uscourts.gov-252fimages-252fstories-252fopinions-

One Legal Standard For Generic Analysis, Whether Trademark Is A Compound Term Or A Phrase

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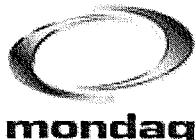
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United States: One Legal Standard For Generic Analysis, Whether Trademark Is A Compound Term Or A Phrase

Mondaq Business Briefing

May 26, 2015 Tuesday

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Length: 513 words

Byline: Joseph Robinson, Ryan A. Schneider, Robert Schaffer, Parker D. Hancock, John A. Morrisett and Tinh Nguyen

Body

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United States: One Legal Standard For Generic Analysis, Whether Trademark Is A Compound Term Or A Phrase

disregarded PV's expert survey without any explanation, the Court required appropriate consideration be given to the proffered survey evidence on remand.

The content of this article is intended to provide a general guide to the subject matter. Specialist advice should be sought about your specific circumstances.

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Cape Cod® Will Stash \$60,000 into Bags of Potato Chips This Summer; 12 Winners Will Find \$5,000 in Bags of Cash Giveaway Beginning May 25

PR Newswire

May 25, 2015 Monday 9:00 AM EST

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Length: 566 words

Dateline: HYANNIS, Mass., May 25, 2015

Body

One dozen lucky Cape Cod® fans will become \$5,000 richer this summer with the start of the potato chip brand's Ridiculously Good Bags of Cash giveaway. Beginning today through September 30, 2015, Cape Cod®, known for its kettle cooked potato chips with distinct flavors and a hearty crunch, will roll out specially marked bags of chips across the country in grocery stores, mass market retailers or both. Twelve of these bags may contain a winning game card worth \$5,000.

"Summers on the Cape are full of fun times, great memories and plenty of Cape Cod chips," said Rod Troni, Chief Marketing Officer, Snyder's-Lance, Inc. "Imagine what your summer would be like if you opened your favorite bag of Cape Cod chips and found a game card worth \$5,000 inside, which is exactly what 12 winners will experience."

Each winning bag will include a game card worth \$5,000, redeemable via mail. Winners are encouraged to post photos capturing the excitement of winning on Twitter @CapeCodChips orFacebook.com/CapeCodChips,using #BagsofCash.

Winning game cards will be found in specially marked, 8.5-ounce bags of the following Cape Cod varieties -Cape Cod Original, Cape Cod Original 40% Reduced FatandCape Cod Sea Salt Waffle Cut Chipstoday through September 30, 2015. For more information about how to win \$5,000 to make summer ridiculously good and to follow along as the winning bags are found, visitCapeCodChips.com/BagsofCash.

About Cape Cod

For 30 years the legendary crunch ofCape Cod®has made the kettle cooked chips a favorite on the Cape and across the United States. The distinctive crunch, flavors and freshness are a welcome discovery for those looking for an authentic snack. Cape Cod® chips are made with all-natural ingredients and cooked in 100% canola oil with no trans fat or preservatives. Our process of cooking in only small kettle batches may take a little longer, but it offers a more satisfying and fulfilling snack experience. We apply the same care and commitment to quality when making our ready-made Cape Cod Popcorn and Cape Cod tortilla Dipping Shells. Cape Cod® products are available at major retailers across the country. VisitCapeCodChips.comorFacebook.com/CapeCodChipto locate a retailer or to order online.

About Snyder's-Lance, Inc.

Snyder's-Lance, Inc., headquartered in Charlotte, N.C., manufactures and markets snack foods throughout the United States and internationally. Snyder's-Lance's products include pretzels, sandwich crackers, pretzel crackers, potato chips, cookies, tortilla chips, restaurant style crackers, nuts and other snacks. Snyder's-Lance has manufacturing facilities in North Carolina, Pennsylvania, Indiana, Georgia, Arizona, Massachusetts, Florida, Wisconsin and Ohio. Products are sold under the Snyder's of Hanover®, Lance®, Cape Cod®, Snack Factory®, Pretzel Crisps®, Late July®, Krunchers®, Tom's®, Archway®, Jays®, Stella D'oro®, Eatsmart(TM), O-Ke-Doke®

Cape Cod® Will Stash \$60,000 into Bags of Potato Chips This Summer; 12 Winners Will Find \$5,000 in Bags of Cash Giveaway Beginning May 25

and other brand names. Products are distributed nationally through grocery and mass merchandisers, convenience stores, club stores, food service outlets and other channels. LNCE-G

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To view the original version on PR Newswire, visit:<http://www.prnewswire.com/news-releases/cape-cod-will-stash-60000-into-bags-of-potato-chips-this-summer-300088133.html>

SOURCE Snyder's-Lance, Inc.

CONTACT: Stacey McCray, 704-552-6565, stacey.mccray@lgapr.com

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Troutman Sanders Federal Circuit Review - May 21, 2015

Troutman Sanders LLP Virginia IP Law

May 22, 2015 Friday 4:30 PM EST

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Length: 2430 words

Body

May 22, 2015(Troutman Sanders LLP Virginia IP Law: <http://www.virginiaiplaw.com> Delivered by Newstex) ;<nl/> Each week, Troutman Sanders' Federal Circuit review summarizes the Federal Circuit precedential patent opinions from the prior week. <nl/> This week:<nl/> A Single Entity Must Perform Every Step of a Method to Infringe Under § 271(a) 'Qualitative' Investments Alone Are Insufficient To Satisfy Domestic Industry Requirement of § 337 One Legal Standard for Generic Analysis, Whether Trademark Is a Compound Term or a Phrase<nl/>

<nl/>A Single Entity Must Perform Every Step of a Method to Infringe Under § 271(a)<nl/> Akamai Techs. v. Limelight Networks, Inc., No. 2009-1372, -1380, -1416, -1417, 2015 U.S. App. LEXIS 7856 (Fed. Cir. May 13, 2015) (Linn, J.) (Moore, J., dissenting). Click [Here](#)[1] for a copy of the opinion.<nl/> Akamai Technologies sued Limelight for infringement of a patent related to content distribution on the internet. Limelight performed each step of the asserted method claim, except for a 'tagging' step that was performed by Limelight's customers. In a previous appeal, the Supreme Court held that Limelight could not be held liable for inducing infringement under § 271(b) unless someone, induced by Limelight, had directly infringed the method claim. However, the Supreme Court did not decide whether either Limelight or its customers directly infringed Akamai's patent, and remanded the case to the Federal Circuit on that issue.<nl/> The Federal Circuit held that neither Limelight nor its customers had directly infringed Akamai's patented method. A method claim is only directly infringed when all method steps are performed by a single entity. This 'single entity' can include more than one party only where there is a principal-agent relationship, a contractual arrangement, or a joint enterprise. One entity must act as a 'mastermind,' with sufficient control over others such that their acts are attributable to the mastermind. Here, the relationship between Limelight and their customers is not sufficient to find that either party performed all the steps of the method claim, and thus neither party directly infringed the patent.<nl/> The majority reached this result by holding that 35 U.S.C. § 271(a) does not embrace joint tortfeasor theories. Under the common law, two parties acting in concert, in pursuit of a common goal, plan, or purpose, would be sufficient for liability. However, the statute did not incorporate common-law theories. Instead, § 271(b) and (c) are the only circumstances that Congress intended for a party to be liable for less than a direct infringement. Further, a reading of § 271(a) that permitted joint tortfeasor theories would render § 271(b) redundant. The majority also criticized the dissent for supporting an intent requirement for direct infringement, encouraging predatory customer infringement suits, and permitting the absurd result that a customer could infringe a dependent claim while not infringing the related independent claim.<nl/> Judge Moore dissented, arguing that § 271(a) includes joint tortfeasor liability. The majority's 'single entity' rule came from a misreading of *Warner-Jenkinson Co. v. Hilton Davis Chemical Co.*, 520 U.S. 17, 40 (1997). The 'all-elements rule' for the purposes of the Doctrine of Equivalents does not likewise require a single entity to infringe all elements under § 271(a). Additionally, the term 'whoever' used at the beginning of § 271(a) is plural, not singular, and thus refers to the acts of multiple persons. Further, between the Supreme Court's reading of 271(b) and the majority's reading of 271(a), Akamai's invention is clearly being infringed, yet Akamai has no remedy, creating a 'gaping hole' in liability under § 271. Finally, even if the majority's rule applied, Limelight is clearly the mastermind of the infringement, and should be found liable under the majority's rule. They provided the system, and perform all steps, except one. That one step is necessary for customers to use Limelight's system, and thus one that all customers perform. Judge Moore concludes her dissent by calling for the Federal Circuit to take the case en banc to decide whether the single-entity rule, or common-law joint tortfeasor rule applies to infringement under § 271(a).<nl/> 'Qualitative'

Investments Alone Are Insufficient To Satisfy Domestic Industry Requirement of § 337<nl> Lelo Inc. and Lelo AB v. ITC et al., No. 2013-1582, 2015 U.S. App. LEXIS 7708 (Fed. Cir. May 11, 2015) (Reyna, CJ.). Click [Here](#)[2] for a copy of the opinion.<nl> Standard Innovation Corporation and Standard Innovation (US) Corp. (collectively, 'Standard') filed a complaint against Lelo Inc. and Lelo AB (collectively, 'Lelo') with the International Trade Commission ('ITC'). Standard alleged violation of Section 337 of the Tariff Act of 1930 for the importation into the U.S. and sale of certain kinesiotherapy devices and related components that infringe one or more claims of U.S. Patent No. 7,931,605 and U.S. Patent No. D605,779. Standard later withdrew the '779 design patent from the investigation. To obtain relief from the ITC for patent infringement, Section 337 requires that Standard demonstrate a domestic industry in the U.S. that relates to articles protected by the asserted '605 patent. The domestic industry requirement consists of a technical prong and an economic prong.<nl> After an evidentiary hearing, an administrative law judge ('ALJ') issued an Initial Determination ('ID') construing the terms of the asserted claims, finding the '605 patent valid and infringed, and finding no violation of Section 337 on the grounds the Standard did not satisfy the economic prong of the domestic industry requirement. Specifically, purchases of certain off-the-shelf components were deemed insufficient to satisfy the economic prong because they were small in dollar amount. There was no indication of 'what portion, if any, the purchase price actually contributed towards a domestic investment in plant or equipment . . . [or] to research and development costs incurred in the development of the components.' Further, even if the purchase price of the components could be attributed to domestic activities, such investments were insubstantial and insignificant.<nl> The International Trade Commission ('ITC') reviewed the ID and determined that Standard satisfied both the technical and economic prongs of the domestic industry requirement and that there was a violation of Section 337 with respect to the '605 patent. Although the ITC essentially agreed that the 'modest' investments were trivial in amount, it found that the 'crucial' nature of the purchased components to the overall devices was 'sufficient' to find that the investments satisfied the economic prong of the domestic requirement. While the investments were small, the 'contribution of the components at issue from a qualitative standpoint is indeed significant.' Lelo appealed the ITC's final determination.<nl> The Federal Circuit reversed the ITC's decision, concluding that Standard did not satisfy the economic prong of the domestic industry requirement for the '605 patent. The decision 'turn[ed] on the single question of whether qualitative factors alone are sufficient to satisfy the 'significant investment' and 'significant employment' requirements of § 337.' The plain text of Section 337 requires 'a quantitative analysis in determining whether a petitioner has demonstrated a 'significant investment in plant and equipment' or 'significant employment of labor or capital.' Rejecting the ITC's 'qualitative approach,' the Court explained that 'the terms 'significant' and 'substantial' refer to an increase in quantity, or to a benchmark in numbers.' The record was devoid of information that would indicate the 'magnitude of labor expended to produce the components, [] the amount the suppliers invested in their equipment, . . . [or] the share of labor or capital costs attributable solely to purchases made by Standard Innovation.' Agreeing that Standard's investment and employment prongs (A) and (B) were quantitatively 'modest and insignificant,' the Court concluded that '[q]ualitative factors cannot compensate for quantitative data that indicate insignificant investment and employment.'<nl> One Legal Standard for Generic Analysis, Whether Trademark Is a Compound Term or a Phrase<nl> Princeton Vanguard, LLC, v. Frito-Lay North America, Inc., No. 2014-1517, 2015 U.S. App. LEXIS 8002 (Fed. Cir. May 15, 2015) (O'Malley, J.). Click [Here](#)[3] for a copy of the opinion.<nl> After successfully registered the trademark **PRETZEL CRISPS** for 'pretzel crackers' on the Supplemental Register, Princeton Vanguard ('PV') applied for the Principal Register. Frito-Lay filed a notice of opposition to PV's application and a petition to cancel PV's Supplemental Registration. 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change this inquiry. Here, after concluding that **PRETZEL CRISPS** is a compound term, the Board did not 'assess whether the public understands the mark, as a whole, to refer to that genus.' The Court concluded that the Board applied the incorrect legal standard.<nl/> PV also argued that 'the Board cherry-picked the media references in the record and chose only those references that supported genericness.' The Court did not analyze the parties' arguments with respect to the evidence of record, but reiterated that 'substantial evidence review 'requires an examination of the record as a whole, taking into account both the evidence that justifies and detracts from an agency's opinion.' Because the Board disregarded PV's expert survey without any explanation, the Court required appropriate consideration be given to the proffered survey evidence on remand.<nl/> The following opinions are not reported in this newsletter:<nl/> Apple Inc. v. Samsung Electronics Co., No. 2014-1335, 2015-1029, 2015 U.S. App. LEXIS 8096 (Fed. Cir. May 18, 2015) (affirming on the judgment of damages for utility patents but remanding on the judgment of trade dress infringement). Click [Here](#)[4] for a copy of the opinion.<nl/> **<nl/> Each week, we succinctly summarize the preceding week of Federal Circuit precedential patent opinions. We provide the pertinent facts, issues, and holdings. Our Review allows you to keep abreast of the Federal Circuit's activities - important for everyone concerned with intellectual property. We welcome any feedback you may provide.<nl/> - Joe Robinson[5], Ryan Schneider[6], Bob Schaffer[7], Parker Hancock[8], John Morrissett[9] and Tinh Nguyen[10]. <nl/> If you would like to receive the Troutman Sanders Federal Circuit Review newsletter via e-mail, please click [here](#)[11] to send your request.<nl/> [1]: http://www.troutmansanders.com/joseph_robinson/ [6]: http://www.troutmansanders.com/ryan_schneider/ [7]: http://www.troutmansanders.com/robert_schaffer/ [8]: http://www.troutmansanders.com/parker_hancock/ [9]: http://www.troutmansanders.com/john_morrissett/ [10]: http://www.troutmansanders.com/tinh_nguyen/ [11]: PRandMarketingCommunicationsALL@troutmansanders.com

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Troutman Sanders Federal Circuit Review - May 21, 2015

Patent Law Community

May 22, 2015 Friday 5:49 PM EST

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Length: 2649 words

Body

May 22, 2015(Patent Law Community: <http://www.lexisnexis.com/legalnewsroom/intellectual-property/b/patent-law-blog/default.aspx> Delivered by Newstex) ;<nl/> Each week, Troutman Sanders' Federal Circuit review summarizes the Federal Circuit precedential patent opinions from the prior week. <nl/> This week:<nl/> A Single Entity Must Perform Every Step of a Method to Infringe Under § 271(a) 'Qualitative' Investments Alone Are Insufficient To Satisfy Domestic Industry Requirement of § 337 One Legal Standard for Generic Analysis, Whether Trademark Is a Compound Term or a Phrase<nl/>

A Single Entity Must Perform Every Step of a Method to Infringe Under § 271(a)<nl/> Akamai Techs. v. Limelight Networks, Inc., No. 2009-1372, -1380, -1416, -1417, 2015 U.S. App. LEXIS 7856 (Fed. Cir. May 13, 2015) (Linn, J.) (Moore, J., dissenting). Click [Here\[1\]](#) for a copy of the opinion [an enhanced version of this opinion is available to lexis.com subscribers^[2]].<nl/> Akamai Technologies sued Limelight for infringement of a patent related to content distribution on the internet. Limelight performed each step of the asserted method claim, except for a 'tagging' step that was performed by Limelight's customers. In a previous appeal, the Supreme Court held that Limelight could not be held liable for inducing infringement under § 271(b) unless someone, induced by Limelight, had directly infringed the method claim. However, the Supreme Court did not decide whether either Limelight or its customers directly infringed Akamai's patent, and remanded the case to the Federal Circuit on that issue.<nl/> The Federal Circuit held that neither Limelight nor its customers had directly infringed Akamai's patented method. A method claim is only directly infringed when all method steps are performed by a single entity. This 'single entity' can include more than one party only where there is a principal-agent relationship, a contractual arrangement, or a joint enterprise. One entity must act as a 'mastermind,' with sufficient control over others such that their acts are attributable to the mastermind. Here, the relationship between Limelight and their customers is not sufficient to find that either party performed all the steps of the method claim, and thus neither party directly infringed the patent.<nl/> The majority reached this result by holding that 35 U.S.C. § 271(a) does not embrace joint tortfeasor theories. Under the common law, two parties acting in concert, in pursuit of a common goal, plan, or purpose, would be sufficient for liability. However, the statute did not incorporate common-law theories. Instead, § 271(b) and (c) are the only circumstances that Congress intended for a party to be liable for less than a direct infringement. Further, a reading of § 271(a) that permitted joint tortfeasor theories would render § 271(b) redundant. The majority also criticized the dissent for supporting an intent requirement for direct infringement, encouraging predatory customer infringement suits, and permitting the absurd result that a customer could infringe a dependent claim while not infringing the related independent claim.<nl/> Judge Moore dissented, arguing that § 271(a) includes joint tortfeasor liability. The majority's 'single entity' rule came from a misreading of *Warner-Jenkinson Co. v. Hilton Davis Chemical Co.*, 520 U.S. 17, 40 (1997) [enhanced version^[3]]. The 'all-elements rule' for the purposes of the Doctrine of Equivalents does not likewise require a single entity to infringe all elements under § 271(a). Additionally, the term 'whoever' used at the beginning of § 271(a) is plural, not singular, and thus refers to the acts of multiple persons. Further, between the Supreme Court's reading of 271(b) and the majority's reading of 271(a), Akamai's invention is clearly being infringed, yet Akamai has no remedy, creating a 'gaping hole' in liability under § 271. Finally, even if the majority's rule applied, Limelight is clearly the mastermind of the infringement, and should be found liable under the majority's rule. They provided the system, and perform all steps, except one. That one step is necessary for customers to use Limelight's system, and thus one that all customers perform. Judge Moore concludes her dissent

by calling for the Federal Circuit to take the case en banc to decide whether the single-entity rule, or common-law joint tortfeasor rule applies to infringement under § 271(a).
<nl/> 'Qualitative' Investments Alone Are Insufficient To Satisfy Domestic Industry Requirement of § 337
Lelo Inc. and Lelo AB v. ITC et al., No. 2013-1582, 2015 U.S. App. LEXIS 7708 (Fed. Cir. May 11, 2015) (Reyna, CJ.). Click [Here](#)[4] for a copy of the opinion [enhanced version^[5]].
<nl/> Standard Innovation Corporation and Standard Innovation (US) Corp. (collectively, 'Standard') filed a complaint against Lelo Inc. and Lelo AB (collectively, 'Lelo') with the International Trade Commission ('ITC'). Standard alleged violation of Section 337 of the Tariff Act of 1930 for the importation into the U.S. and sale of certain kinesiotherapy devices and related components that infringe one or more claims of U.S. Patent No. 7,931,605 and U.S. Patent No. D605,779. Standard later withdrew the '779 design patent from the investigation. To obtain relief from the ITC for patent infringement, Section 337 requires that Standard demonstrate a domestic industry in the U.S. that relates to articles protected by the asserted '605 patent. The domestic industry requirement consists of a technical prong and an economic prong.
<nl/> After an evidentiary hearing, an administrative law judge ('ALJ') issued an Initial Determination ('ID') construing the terms of the asserted claims, finding the '605 patent valid and infringed, and finding no violation of Section 337 on the grounds the Standard did not satisfy the economic prong of the domestic industry requirement. Specifically, purchases of certain off-the-shelf components were deemed insufficient to satisfy the economic prong because they were small in dollar amount. There was no indication of 'what portion, if any, the purchase price actually contributed towards a domestic investment in plant or equipment . . . [or] to research and development costs incurred in the development of the components.' Further, even if the purchase price of the components could be attributed to domestic activities, such investments were insubstantial and insignificant.
<nl/> The International Trade Commission ('ITC') reviewed the ID and determined that Standard satisfied both the technical and economic prongs of the domestic industry requirement and that there was a violation of Section 337 with respect to the '605 patent. Although the ITC essentially agreed that the 'modest' investments were trivial in amount, it found that the 'crucial' nature of the purchased components to the overall devices was 'sufficient' to find that the investments satisfied the economic prong of the domestic requirement. While the investments were small, the 'contribution of the components at issue from a qualitative standpoint is indeed significant.' Lelo appealed the ITC's final determination.
<nl/> The Federal Circuit reversed the ITC's decision, concluding that Standard did not satisfy the economic prong of the domestic industry requirement for the '605 patent. The decision 'turn[ed] on the single question of whether qualitative factors alone are sufficient to satisfy the 'significant investment' and 'significant employment' requirements of § 337.' The plain text of Section 337 requires 'a quantitative analysis in determining whether a petitioner has demonstrated a 'significant investment in plant and equipment' or 'significant employment of labor or capital.' Rejecting the ITC's 'qualitative approach,' the Court explained that 'the terms 'significant' and 'substantial' refer to an increase in quantity, or to a benchmark in numbers.' The record was devoid of information that would indicate the 'magnitude of labor expended to produce the components, [] the amount the suppliers invested in their equipment, . . . [or] the share of labor or capital costs attributable solely to purchases made by Standard Innovation.' Agreeing that Standard's investment and employment prongs (A) and (B) were quantitatively 'modest and insignificant,' the Court concluded that '[q]ualitative factors cannot compensate for quantitative data that indicate insignificant investment and employment.'
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<http://www.lexisnexis.com/terms/general.aspx>

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"Frito-Lay loses battle over rival's 'Pretzel Crisps' name"

How Appealing

May 16, 2015 Saturday 3:47 AM EST

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Length: 244 words

Body

May 16, 2015(How Appealing: <http://howappealing.law.com/> Delivered by Newstex) <nl/> "Frito-Lay loses battle over rival's 'Pretzel Crisps' name": Reuters has this report[1].<nl/> And Law360.com reports that "Fed. Circ. Nixes Ruling That 'Pretzel Crisps' Is Generic[2]."<nl/><nl/>You can access today's ruling of the U.S. Court of Appeals for the Federal Circuit[3] at this link[4].<nl/><nl/>Earlier, "The TTABlog" had a post titled "Precedential No. 6: TTAB Finds PRETZEL CRISPS Generic for Pretzel Crackers[5]" about the ruling[6] of the U.S. Patent and Trademark Office's Trademark Trial and Appeal Board[7] in the case.<nl/><nl/>And even earlier, The New York Times reported on the underlying dispute in an article headlined "Trademarks Take On New Importance in Internet Era[8]."<nl/> [1]:

<http://www.reuters.com/article/2015/05/15/ip-fritolay-decision-idUSL1N0Y62K820150515> [2]:
<http://www.law360.com/articles/656542/fed-circ-nixes-ruling-that-pretzel-crisps-is-generic> [3]:
<http://www.cafc.uscourts.gov> [4]: <http://www.cafc.uscourts.gov/images/stories/opinions-orders/14-1517.Opinion.5-13-2015.1.PDF> [5]: <http://www.thettablog.blogspot.com/2014/03/precedential-no-6-ttab-finds-pretzel.html> [6]: <http://ttabvue.uspto.gov/ttabvue/ttabvue-92053001-CAN-19.pdf> [7]:
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<http://www.nytimes.com/2012/02/21/business/battle-over-pretzel-crisps-shows-value-of-a-brand.html>

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5 tips for stress-free traveling on a gluten-free diet

The Seahawk: University of North Carolina Wilmington

May 13, 2015 Wednesday

University Wire
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Section: NEWS; Pg. 1

Length: 482 words

Body

- Gluten-free diets are on the rise, especially with an estimated one in 133 Americans affected by Celiac disease, according to the National Foundation for Celiac Awareness. When a member of the family has a restricted diet, travel can be challenging, but with advance preparation you can take the guesswork out of summer vacation and focus on having fun with your loved ones instead. Whether you're hitting the road, sky or rails, here are five simple tricks for stress-free, gluten-free travel:

Plan meals ahead of time

Avoid "Is there anything on the menu I can actually eat?" moments by reserving gluten-free meals in advance when traveling by air or sea and researching gluten-free-friendly restaurants wherever you'll be staying. Since most restaurants post their menus online these days, a quick scan of their offerings before heading out the door can help you steer meal plans toward places that offer gluten-free dishes and ensure that everyone enjoys mealtime.

Pack your own snacks

While gluten-free foods are more prevalent than ever, the options can still be limited in many places around the world, so remember to pack travel-friendly snacks before departure. You want to focus on satisfying, wholesome options that can tide you over until your next meal. Some of these options include: dried fruit, nuts, or new Snack Factory **Pretzel Crisps** Gluten Free Minis in Original and Salted Caramel flavors. The resealable bags are ideal for snacking throughout long road trips and sharing with any family member craving a crunchy, wholesome treat.

Cook if you can

Remove the risk of eating unknown ingredients on the road by opting to stay at places where you have control of the cooking quarters. Many hotels offer eat-in cooking facilities that are perfect for those who need to stick to a controlled diet and home or apartment rentals typically include kitchens. Stock up on gluten-free groceries from the local supermarket and enjoy a home cooked meal on vacation. You'll also enjoy the added bonus of saving money by not dining out for every meal.

Learn the lingo

If you'll be traveling to a foreign country, be sure to brush up on important words that can make all the difference during mealtime. Food allergy translation cards have become a common travel tool for those adhering to a gluten-free diet. Printable or downloadable to a mobile device, these cards can help communicate the exact ingredients you'd like to avoid when purchasing or ordering foods in an unfamiliar language.

Seek support

5 tips for stress-free traveling on a gluten-free diet

Finally, don't be afraid to reach out to locals. Many cities have gluten-free or Celiac disease support groups, the members of which will be able to offer you guidance and suggestions on where and what to eat in the area. Organizations such as the Gluten Intolerance Group offer an online directory of local community branches that can be an invaluable resource when journeying away from home.

Load-Date: May 14, 2015

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5 tips for stress-free traveling on a gluten-free diet

Delta Democrat Times (Greenville, Mississippi)

May 13, 2015 Wednesday

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Section: ONLINEFEATURES

Length: 485 words

Byline: Brandpoint (BPT)

Body

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5 tips for stress-free traveling on a gluten-free diet

The Flor-Ala: University of North Alabama

May 13, 2015 Wednesday

University Wire

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Section: SEARCH; Pg. 1

Length: 482 words

Body

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Avoid "Is there anything on the menu I can actually eat?" moments by reserving gluten-free meals in advance when traveling by air or sea and researching gluten-free-friendly restaurants wherever you'll be staying. Since most restaurants post their menus online these days, a quick scan of their offerings before heading out the door can help you steer meal plans toward places that offer gluten-free dishes and ensure that everyone enjoys mealtime.

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5 tips for stress-free traveling on a gluten-free diet

Western Courier: Western Illinois University

May 13, 2015 Wednesday

University Wire

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Section: ONLINE-FEATURES; Pg. 1

Length: 487 words

Body

May 13, 2015

Filed under Travel

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5 tips for stress-free traveling on a gluten-free diet

The Seahawk: University of North Carolina Wilmington

May 13, 2015 Wednesday

University Wire
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Section: NEWS; Pg. 1

Length: 482 words

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5 tips for stress-free traveling on a gluten-free diet

The Poly Post: California State Polytechnic University - Pomona

May 12, 2015 Tuesday

University Wire

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Section: ONLINE FEATURES; Pg. 1

Length: 482 words

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5 tips for stress-free traveling on a gluten-free diet

The Round Up Daily: New Mexico State University

May 12, 2015 Tuesday

University Wire

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Q1 2015 Snyder'sLance Inc Earnings Call - Final

FD (Fair Disclosure) Wire

May 8, 2015 Friday

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Length: 10249 words

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Corporate Participants

* Mark Carter

Snyder's-Lance, Inc. - VP Strategic Initiatives, IR

* Carl Lee

Snyder's-Lance, Inc. - President, CEO

* Rick Puckett

Snyder's-Lance, Inc. - EVP, CFO, Chief Administrative Officer

Conference Call Participants

* Bill Chappell

SunTrust Robinson Humphrey - Analyst

* Amit Sharma

BMO Capital Markets - Analyst

* Rohini Nair

Deutsche Bank - Analyst

* Brett Hundley

BB&T Capital Markets - Analyst

* Akshay Jagdale

KeyBanc Capital Markets - Analyst

* Jonathan Feeney

Athos Research - Analyst

* Michael Gallo

CL King & Associates - Analyst

Presentation

OPERATOR: Good morning, ladies and gentlemen, and welcome to the Snyder's-Lance first quarter 2015 financial results conference call. At this time all participants are in a listen only mode. Later we will conduct a question and answer session and instructions will follow at that time. (Operator Instructions). As a reminder this conference call is being recorded. I would now like to turn the call over to your host, Mr. Mark Carter, Vice President and Investor Relations Officer. Mr. Carter, you may begin.

MARK CARTER, VP STRATEGIC INITIATIVES, IR, SNYDER'S-LANCE, INC.: Thank you, Bridget. Good morning, everyone. With me today are Carl Lee, President and Chief Executive Officer, as well as Rick Puckett, Executive Vice President, Chief Financial Officer, and Chief Administrative Officer, of Snyder's-Lance, Incorporated. During today's call we will discuss our 2015 first quarter results as well as estimates for the balance of the year. As a reminder we are web-casting this conference call including the supporting slide presentation on our website at snyderslance.com.

Before we begin, I'd like to point out that during today's presentation management may make forward-looking statements about our Company's performance. Please refer to the Safe Harbor language included in each of our presentations. I'll now turn the call over to Carl Lee, President and Chief Executive Officer, to begin management's comments.

CARL LEE, PRESIDENT, CEO, SNYDER'S-LANCE, INC.: Thank you, Mark. Good morning, everyone. I'd like to welcome our investors and our analysts and our partners to the call this morning. Really appreciate you sharing your time. I know it's been a very busy week for analysts and I appreciate you dialing in to get an update on our Q1 results. If I can draw your attention to page 3 we'll give you an idea what have we're going to cover. We'll cover our first quarter highlights, we'll talk a little about our area of focus and strategic plan and then we will also open it for Q&A to deal with additional questions that you would like to ask.

If we can now turn to page four I'll give you an update and kind of some highlights for the quarter. We're very pleased with the first quarter. We see that we had very strong top line and bottom line performance. We're actually very excited about our overall sales growth of 7.9%. Our branded volume grew at 6.8% and was driven by our core brands which was actually up 8.6% for the quarter. So we saw good results from Cape Cod, Snack Factory, Late July, Snyder's of Hanover, and also our Lance Sandwich Crackers. We saw strong market share growth across all of our salty business and we saw positive trends developing in our bakery products. As we continue to invest in marketing and advertising ahead of last year.

Overall for 2015 so far our new product innovation is off to a very successful start with strong retail acceptance driven by our DSD distribution capability that allows us to get our great new products to the shelf very quickly and provide efficient and effective merchandising at store level for high visibility.

Our ""better for you"" products are delivering strong growth driven by distribution gains and household penetration. We've also completed the integration of Baptista with our systems that allows us to drive further efficiency and share information much quicker between their operation and ours. Our comparison for year over year is a little bit skewed because of the difference in the tax rates. You'll see about a \$0.02 change between the two quarters year over year. That takes a 36% tax rate this year compared to 26% rate last year and you'll get some more comments about that from Rick but that does amount to a \$0.02 difference between the two quarters.

This really is a new day here at Snyder's-Lance. There's a lot of optimism, a lot of enthusiasm about what we're doing, where we're going. We're excited about this year and getting it off to a good start is important to us. And we truly really are hardly working to make sure we make it the very best day we can. With that I'll turn it over to Rick.

RICK PUCKETT, EVP, CFO, CHIEF ADMINISTRATIVE OFFICER, SNYDER'S-LANCE, INC.: Thanks, Carl. Good morning, everyone. Let's turn to page 5 so we can dive into the details of the financials a little bit more. Our first quarter revenue as Carl mentioned was very strong. We saw branded growth of 5%, \$13.3 million, but overall revenue increased by almost 8% versus last year. The 5% in branded was driven by good growth across all of our brands. Our core brand growth was 6.6% and then if you take pricing out, it actually, as Carl mentioned, was 8.6% volume growth in the quarter.

The organic growth was approximately 6% across all of our core brands. We grew significantly, the market share as Carl mentioned, across all of our core brands except Lance where we actually were flat and this actually is improvement over previous quarters. We are starting to see even more positive trends with Lance in the current quarter. Partner brands, revenue growth was up 6.2% as we continued to excise our [GSV] muscle. The increase in other revenue is largely related to the Baptista acquisition.

So if we go to page six, let's get into some of the other margin kind of statistics. Gross margin decreased 100 basis points year over year. This was largely driven by the increased rate promotion activity of approximately 100 basis points, actually. And this was to support our new product roll out and the timing of certain new promotions in Snack Factory as we continue to drive those brands. Operating income as a percentage of revenue decreased ten basis points to 4.8% of net revenue over last year. The fall short in gross margin obviously was offset significantly by the SG&A expenses below. Our SG&A expense actually improved 90 basis points over last year.

In addition, we actually increased our spend in investment in marketing and advertising by 25 basis points to support our core brand growth and the innovation that we put out in Q1. As Carl mentioned a few minutes ago, the income tax rate as you can see is ten points higher than last year. This year is a more normalized rate, whereas last year was impacted with a favorable tax adjustment that we recorded in Q1 of last year. This impacted the comparisons by \$0.02, as Carl mentioned.

We do expect 35% to be the full year type of rate for 2015. As a result EPS was flat year over year and we, as Carl mentioned, we're pleased with that result given our internal targets. If we go to page seven and we look at free cash flow, you can see that I've dropped the comparisons to prior year here because prior year actually includes discontinued operations and it's not a true comparison. So what we're assuming is our free cash flow at \$49 million for the Q1 in a rolling 12-month basis, remaining fairly strong. Our debt leverage is actually 1.1, reflecting a strong balance sheet with significant capacity. Let's turn to page eight and talk about the full year estimates.

As you saw in our press release and you see on this page, we have in fact improved our estimates over last quarter, and we're doing that as a result of meeting our internal expectations in Q1. The estimates for net revenue in 2015 is within the range of 1.69 to 1.72. This still represents a 6.3% to an 8% increase over last year. EPS is expected to be between \$1.11 and \$1.19, an increase of 23% to 32% over last year on a comparable basis. As we spoke to last quarter we will see a different seasonality to our business than what we've seen before.

The introduction of Baptista's and the loss of private brands has significantly shifted the quarterly mix of EPS. We will continue to invest in the core brands in Q2 by bringing some spending from Q3 forward. These investments will be in trade and marketing support to reinforce the top line momentum that we saw in Q1. This will result in seasonality of full year earnings around 21% to 22% in Q2, and 30% to 31% in Q3 with remainder in Q4. As you also see here tightening up our CapEx range and reducing the top end to \$62 million for the year. At this time I'll turn it back over to Carl for further comments.

CARL LEE: Thank you, Rick. If we can turn to page 10 we'll walk through some of the highlights in the quarter and some of the strategic plans we've got in place for the business. Beginning on page 10 we've got our purpose statement, "Snacking is a part of life.... Our passion makes it better!". What we're seeing, everyone is seeing, eating on the go is really becoming the norm today and snacking really is part of everyone's life and we are absolutely committed to make sure that we do our very best and allow our passion to show through in the great products we make, our great distribution programs so we get them out there to our consumers, and really make sure that we're providing what people everywhere wants to eat on a day in and day out basis.

So now, turning to page eleven, we'll talk a little bit more about the other trends that we're seeing. Just to be a little bit bold, consumers really are driving a food revolution. Things are dramatically changing. We talk about it and we see it in the paper day in day out. The beauty of it is we've worked hard to position our Company to capture these opportunities. If you look back at the heavy lifting we did last year to sell off our private brand business, acquire Baptista, (inaudible) late July, and then all the internal work we did was really repositioned our Company to really cater to these opportunities and really take advantage of them. One of the ones we see clear is the demographic changes. We welcome those changes because it really is beginning to have an influence on what people eat and how they eat it.

And those changes are going to just continue to evolve over time. Demand for healthier snacking is something that we all clearly see, both the natural and organic retail sales have climbed over \$60 billion annually and will continue to climb as we go forward. And then lifestyles, everyone's lifestyle is very busy, we just don't have enough time to sit down as much as we'd like to with our families for meals so 45% of consumers are eating more and more snacks on the go and that's an area that we see as a real opportunity for our Company as we continue to work on convenience and affordability.

Turning to page 12 we want to introduce a new term. we've been talking to you for the past year about the ability to renovate our snacks and make sure that our core brands are always relevant and up to date for consumers. I think you've all heard this word renovation begin to take a hold and be used by more and more food companies as they focus on keeping their brands very up to date. so renovation is something that we do quite well but we want to go beyond that, something we've been working on for many months and now comfortable sharing with you is what we call our balanced portfolio and really using that to address consumer needs.

If you take a look over to the left of that page, consumers are snacking in many ways. I think we all realize that but each and every day consumers snack in different ways. Sometimes we're looking for a "better for you" snack, or some fuel, we're looking for some energy and we're looking for it in a much better way, or healthier way. But then other times we're looking to reward ourselves, looking maybe to indulge, and that's where premium snacks really come in play.

Regardless of what the consumers are looking for, if they're looking for non-GMO or looking for organic, we've got a great line up with Late July that caters to their needs whenever that snacking occasion arises. They're looking for gluten-free, they can call on our pretzel crusts and be able to look at one of our new items there to provide what they're looking for in gluten free format. They're look for a healthier potato chip, they've got our reduced fat Cape Cod. They're looking for some wholesome food and something generally better than most other snacks that are out there, our Snyder's of Hanover will play very well. If they're look for something in premium then our protein can be delivered through our Lance sandwich crackers and that allows us to be able to really cater to consumer needs across the wide spectrum of snacks they eat every day and the snacks they eat throughout the week.

So we welcome this because we really compete and win across a lot of different usage occasions and different type of eating occasions that consumers are being motivated to take advantage of. So for us growth really is driven by combination of product renovation, product innovation and really expanding the reach of our brands. To take this concept a little further we've talked a lot about our innovation and our capabilities to deliver really good new products to the marketplace. If I can call your attention to the chart over to the right, top of the page, we really invest a lot in understanding our consumers and their needs more and more day in and day out and we're really committed to leveraging that to, again, build a balanced portfolio.

One of the things that we discovered late last year was really there was no gluten-free sandwich cracker out there or gluten-free sandwich that was portfolio and convenient and a bite size. As we discovered that important need we went to work very quickly to develop that and get it to market as soon as possible. What we're sharing with you today wasn't even on our drawing board in Q3. It really just became a priority in Q4 and we were able to rally our organization, rally our team to deliver a very innovative, very difficult product manufacture and make and deliver a gluten-free sandwich cracker in time for the Expo West trade show that happened in March.

So in a March of just a few months we developed, pioneered, developed, launched and produced a very important new item with our Lance sandwich gluten-free crackers. We're very proud of that as we leveraged our nimbleness to be able to roll that out. We shared that with some of your analysts when you joined the show this past couple months ago and we are excited about what we're seeing with the retailer acceptance and the earlier distribution gains that we've gotten on that product. That goes a long ways to delivering exciting product to the market place fulfilling a white space need as we call it, but also shows our nimbleness and ability to leverage innovation in a very timely way.

Next, we want to talk a little bit about our sharp and focus with Clearview. We launched Clearview late last year. We shared with you the name during Q1. That's a whole new platform and an organization that's really focused on "better for you" snacking and for filling the needs of consumers that are shopping on the perimeter and other places and other channels. Allows us to really be able to position ourselves, again leveraging our nimbleness, to reach out and touch more consumers. The response from Clearview both from industry press and our trade partners has really been overwhelming.

It's been welcomed, it's been endorsed. It's been supported and we've had a lot of activity around that. It allows us to really continue to focus on our sales growth and our top line by driving and leveraging our innovation, distribution, and our ability to execute at retail. And retailers now are seeing Clearview as a platform for growth and "better for you" snacks as we step up to use our nimbleness to provide some of their needs as they make special requests of us.

It allows us also to continue to invest in innovation and we've actually added resources during Q1 to be very nimble on making sure we're delivering the best products as quickly as we can. But beyond that, working on our balance portfolio really requires again that renovation. And we've worked diligently with renovating our Lance sandwich crackers.

The good news is all the packaging transitions have been completed, we're seeing some healthy sales growth return to the overall franchise as we continue to leverage our new packaging, our marketing and our advertising along with some new products to continue to enhance that important consumer franchise. During the last 13 weeks we did see some share gains and we saw the repositioning really take hold and really beginning to pan out in some additional growth. We'll continue to lean in on our Lance sandwich crackers.

We've got new news coming on whole grain and our new gluten-free products I mentioned earlier all will provide important ammunition to continue to grow that business and allow us to gain both top line and market share. Going beyond that we are expanding consumer advertising and a good way to build out our balanced portfolio is with our Snyder's of Hanover pretzel's. One campaign that we've launched that year that we're very excited about and most of you might have seen it already on TV is Discover The Pretzelbilities, a program that we can own and develop and will be uniquely committed to Snyder's that allows us to really share with the consumers how vast and how portable and how efficient our portfolio is in all the different offerings we have.

Just take a look at the picture right there. If you're interested in a gluten-free product, we've got it. If you're interested in a traditional product like our mini's, we have that. Poppers, a brand-new product out this year, airy, light pretzel that allows us to cater to special needs and occasions. Bow Tie allows us to be able to have some of the same benefits as a cracker and then if you're ready to indulge yourself with our chocolate covered pretzels we have a unique offering there as well. It's an exciting campaign that's uniquely available to us.

It's kind of up do beat and cheery, and allows us to really call out the benefits of our portfolio and allows us to really have something unique and different to share both on TV, digital, point of sale merchandising and with all of our own line advertising as well. But the exciting thing about pretzels is we really do see this as a balanced portfolio because what we're able to do with these baked "better for you" item is much different than what you can do with most categories in the salty snack aisle. So we see some ability to continue to expand our franchise and deliver a lot of product news under our Snyder's of Hanover pretzel capabilities.

Now turning to page 17, take a look there at our overall portfolio. This is just a highlight of some of our new items that we've launched in 2015. Truly it's a balanced portfolio. If anything, during the first quarter this year we leaned in more towards our premium snacks than we did our ""better for you"" because we've been expanding our "better for you" portfolio for some time.

Whether, again, it's a gluten-free item or a chocolate covered pretzel we really have everything in between covered and we can provide the variety our consumers are looking for, the great quality they expect, the value they naturally determine that they need and be able to provide some unique opportunities for them to continue to snack as often as they want and have a wide variety of the health benefits they're looking for along with just great nutrition and great value.

Turning now to page 18, talking a little bit more about our balanced portfolio. As I mentioned to you earlier from "better for you" snacking all the way to premium snacking we pretty much have it covered and we'll continue to expand our portfolio and allow ourselves to really reach out and look for additional white space and fill it in as quickly as possible providing the consumers exactly the snacking they need. But we started talking to you about a year ago about our "better for you" portfolio and our plans to expand it.

When we started talking to you late last year about it we were about 25% of our overall sales mix was "better for you" products. We committed to expand it, we committed to grow it and as of today 27% of our portfolio is "better for you" snacking. In addition to that we mentioned to you a milestone of shooting for 33%, but I hope you see with our approach to the balanced portfolio, as we will continue to grow both. And as you look back on the previous page at our new products portfolio for this year we really have touched on every aspect of our business from mainstream, premium snacks all the way to better for you as we grow our total portfolio and grow both components to a premium and the better for you segments.

Now turn with me to page 19. We are in place to really drive continued growth for ourselves and our retailers continue to reach out to our consumers and make sure they have the snacks they expect. And we're really proud to be a mid-sized company. We're perfectly positioned to continue to respond to consumer trends in a matter of months be able to launch a difficult product like the gluten-free sandwich crackers, and continue to look for additional new ideas that may come from ourselves, our consumers, our customers or our retailers, to make sure we're leveraging the scale that we've got as a mid-sized company along with the nimbleness to really be able to act quickly and execute efficiently. Our "better for you" snacking really is becoming main stream and our newly created division with Clearview allows us to continue to take advantage of that as we're very close to the consumer needs and the customer needs in the natural channel across not only the natural retailers but consumers that are shopping mainstream stores as well for it.

Our culture really is a culture of winning where we focus on execution, we focus on customer service. One internal term we have is our DNA and our DNA is about being decisive, nimble and aggressive in the way we serve our shareholders and customers day in, day out. We continue to invest in our people, our products, and our capabilities to drive our overall Company and make sure that we live up to our full potential. With our proven M&A track record and strong balance sheet we continue to look for opportunities in that area and we have the team and ability to execute against them when we find them. So we'll continue to look for additional initiatives inside our Company and outside our Company.

That gives you an overview of our balanced portfolio and what we're focused on to continue to drive our overall business, again, catering to exactly what consumers are looking for and serving customers to the best of our ability every day. So with that, I'll turn it back over to Bridget for Q&A and we'll get a chance to listen to your questions and be happy to respond. Thanks again. Bridget?

Questions and Answers

OPERATOR: Thank you, sir. (Operator Instructions). First question from Bill Schapel with SunTrust. Your line is open.

BILL CHAPPELL, ANALYST, SUNTRUST ROBINSON HUMPHREY: Good morning, thanks.

CARL LEE: Good morning, Bill.

BILL CHAPPELL: Good morning. Two questions, I guess first and, I don't want to take away from everything you're doing on the healthy natural side but you don't mention Cape Cod. Is that an area where you think you can also, I mean, is there a focus to try to non-GMO, organic, other things beyond just lower fat, or is it kind of positioned where you want and really focus that with Late July?

CARL LEE: Our Cape Cod franchise, if you looked at your (inaudible) share information has been the fastest growing kettle chip out there for quite sometime. We've had phenomenal growth on our Cape Cod. We've got it positioned very well. The quality, the value, the positioning has worked extremely well. Our reduced fat continues to lead the reduced fat segment. So we feel that we've got that franchise positioned quite well and are pleased with where it stands today. So we'll continue to add variety and flavors, continue to add some additional packaging formats as well as to expand the reach for our consumer base. But we're very pleased where we have it today and proud of the quality we have in the bag.

RICK PUCKETT: Bill to that point we have expanded it into other categories as you've seen about our innovation as well, with ready to eat popcorn and also the dipping shells that just came out. And those are already setting some really good growth records as well with Cape Cod. So I think we recognize that Cape Cod is a great equity in terms of the brand and we'll continue to push it.

BILL CHAPPELL: Yes.

CARL LEE: (multiple speakers) or non-GMO.

BILL CHAPPELL: Okay. I appreciate it. I guess switching then on Late July, can you maybe help us, since you know the ownership, kind of what's going on there I mean it seems like that's getting some pretty big distribution gains. I didn't know if it's focused on the legacy or how much you're seeing in distribution liens on that tortilla chip, kind of outline what you expect over the next year?

CARL LEE: Late July, to your point, is performing extremely well. They've launched a number of new items this year that allows them to continue to expand their tortilla chip franchise but that's where the combination of our companies coming together really work sufficiently. Because they built a great brand, very innovative franchise for consumers there and we are now able to lean our our DSD system to be able to get distribution for them in a lot of channels that they just haven't had a time to reach. So we're seeing strong growth across that franchise, we're seeing ACB up significantly, we're seeing promotional display coverage up, we're seeing velocity up. So all the key indicators is that we're really teaming up to continue to expand that franchise. So they're organic and non-GMO components are working quite well. Share is up in addition.

BILL CHAPPELL: Got it. And that helps. And then last one up for me, Rick, maybe just your comment on the first quarter about kind of the difference year over year on trade promotions and how that impacted. Is that just the comparison or is there a significantly more trade promotions in the first quarter than there historically has been?

RICK PUCKETT: I think the latter is true, Bill. We certainly did invest more in trade promotions in this quarter than we have in the previous years, and we do believe that it is important to certainly support our new product launches as we put those out there. So we did lean in a bit more in Q1 than we have in the past.

BILL CHAPPELL: Great. Thanks so much for the color.

RICK PUCKETT: Thank you.

OPERATOR: Thank you. And our next question is from Amit Sharma with BMO Capital Markets.

AMIT SHARMA, ANALYST, BMO CAPITAL MARKETS: Hi. Good morning, everyone.

RICK PUCKETT: Hello, Amit.

CARL LEE: Hello, Amit.

AMIT SHARMA: Rick, Carl, can you help us understand how much the business is now captured in measured channel data? Because those trends are certainly not as good as the reported sales numbers are. So if you can just help us understand how much of the data is captured in those channels, in that measured channel data, and any color on which categories you feel like we are particularly missing looking at just that data from outside. And then I have another question.

CARL LEE: I think, to your point, Amit, our overall growth is very broad base so we're growing across the spectrum and we're seeing very nice growth in accounts that do not report into IRI or AC Nielsen. So that does have some bearing on the numbers you're seeing versus the number that we see when we report our total sales. A lot of our innovative products sometimes are picked up by, first of all, accounts that are not reporting accounts and we see some tremendous growth and good reach for the consumer base as we get in there, so our broad based growth is really picking up a lot of channels, again, that don't report.

AMIT SHARMA: Any help with numbers, Carl, in terms of is it half of your business in those channels or is it less than half at this point?

CARL LEE: No. We really don't, we don't look at that way and we don't report it that way.

AMIT SHARMA: That's fair. Just trying to get a sense of, you know, whether that data is just off and we shouldn't pay attention to it. Okay. That's fair. And the second question Carl, clearly strong brand and organics brands growth across your key brand and it looks like growth is getting stronger with some of the initiatives you talked about in terms of A&M spending in terms of innovation pipeline. A couple of questions on that. How sustainable is this growth trajectory? That's one. Number two is, when should we start to see some leverage on the operating income line from this strong growth? And the third one Carl is, from a longer term perspective are you ready to commit to this level of growth on a longer term basis? Are you ready to say that, yes, we can grow top line by 5% or 6% or whatever that number is?

CARL LEE: There was a number of questions there, Amit. I appreciate your digging. I think that we've got to be a little careful about projecting the future. We've talked openly about 3% to 5% growth, we feel very comfortable with those targets. We've actually beat it this quarter. We're going to continue to do everything we can to grow as fast as we can. I think if you take a look at number one, we totally repositioned the Company last year. We stepped away from private brands and brought in some great new assets and great new team members to help us both with Late July and Baptista. So that was a big shift in what we are and how we run our business day in, day out.

Those shifts were really fundamental to reading the marketplace and reading the consumer changes and the retailer changes that are out there and better quipping our Company to really executing it day in and day out. So between that and the step up that you've seen in R&D and new product development and being able to do something like Lance sandwich crackers in a matter of months, I mean the capability and the talent here is extremely strong and our innovation pipeline continues to look in the future as strong as it is most recent past.

So we're very pleased where we are and we work diligently day in and day out to really stay ahead of consumer expectations and customer expectations. So I hope that gives you a little bit of color around the capabilities we've got that really allow us to do what we've done most recently.

RICK PUCKETT: Amit, let me add to that. As Carl mentioned the activities we did last year was really designed to drive a more profitable mix across our system, and, you know, eliminate private brands and the volatility that goes with that was a positive thing for us as we move forward. So we still have some work to do I think in the future and we know that we have some better mix opportunities for us as we drive our growth going forward. Obviously, focused on the branded portfolio and even beyond that the core brand portfolio.

So I think our goal is in the near term will be to really drive a better mix of branded products and core brand products to really start to deliver some of that benefit to the bottom line. In addition, I think we will continue to take a

hard look at trade and what is on optimal level of trade. We've invested quite a bit of energy and resources into that part of our business and we are starting to see some benefits of that, but I think the true benefits are yet to come.

AMIT SHARMA: I really appreciate that color. Thank you very much.

RICK PUCKETT: Thank you, Amit.

OPERATOR: Thank you, and our next question is from Rohini Nair with Deutsche Bank. Your line is open.

ROHINI NAIR, ANALYST, DEUTSCHE BANK: Thank you so much. Good morning, everyone.

CARL LEE: Hi, Rohini.

ROHINI NAIR: So, Carl, in the presentation you touched on this idea of renovation, kind of as a way to describe some of the changes you're making to the portfolio. I was just wondering if I could follow up on that. Do you have any sort of targets as to how much you expect innovation to be as a percentage of sales each year? And then within that, how much of your mix is renovation versus innovation or is that measured separately?

CARL LEE: Kind of step back on both of those terms. I think that we're not really setting expectations or external goals that we would share on the share of innovation or percentage of innovation. But we think it's very important to have number one innovation, new product news in your category day in, day out, on your key brands to continue to fuel the growth, kind of anticipating what your consumer is looking for and getting it to market as quickly as possible, it's what innovation is all about. Our step up in our R&D center, our step up in our R&D capability has really kind of shown through recently with both the quality and the number of really truly great products we've been able to launch.

So that kind of handles the innovation question. The renovation is something we've talked about really for the past year and has taken hold really in many other areas as well is that you've got to keep your brands relative.

What we're seeing there is almost overwhelming for the consumer, the number of snack choices they have day in and day out. For you to continue to stand out in a busy category you've got to have renovation that allows your brands to stay relevant, stay current. That may be improving the packaging, may be improving the quality, may be improving the positioning or other consumer benefits that they're looking for to really stay relevant. So renovation really helps you step up there. And we think that you really need both. And I think the key for us is we've talked a lot about leaning into "better for you" and we've done that extensively for the past 18 months, we're seeing some nice progress there. But we're also talking about a balanced portfolio because we're going to make sure all of our brands whether premium our "better for you" are going to get lots of attention on advertising new products, distribution support, retail execution, all of those to help drive it.

So I hope that answers your question because for us it really is a balancing act in making sure that all of our portfolio gets a chance to grow and we're seeing both mainstream and premium and "better for you" all have opportunities to continue to expand and grow.

ROHINI NAIR: Okay, yes, thank you for that. If I could just follow-up, one more question. I know we've heard a lot about brands today and obviously that's very important for your growth. I just wondering if we could get an update on your partner brand business. Has the makeup of the partner brands changed or your relationship with them been changing at all?

CARL LEE: No, it continues to be very strong and very favorable. I think the partner brands are very pleased with the distribution we provide and it's an opportunity for us to help them get to new stores, helps us improve our scale and the frequency of the service calls we're able to make on our stores. So it's really a win/win for both the partner and for us and then it's a very important service for the retailers.

A lot of the retailers come to us and ask us to carry brands because it allows them to consolidate the number of shipments to store level and be able to combine the frequency of our service calls to improve service at store level.

So partner brands are important and it's a nice opportunity for us to leverage our DSD, expand our DSD and afford a larger DSD system in the process.

ROHINI NAIR: Thanks so much. I'll pass it on.

CARL LEE: Thank you.

OPERATOR: Thank you, and our next question is from Brett Hundley with BB&T Capital. Your line is open.

BRETT HUNDLEY, ANALYST, BB&T CAPITAL MARKETS: Good morning, gentlemen.

CARL LEE: Hey, Brett.

RICK PUCKETT: Hey, Brett.

BRETT HUNDLEY: Rick, I had a question for you. I wanted to ask you about your, just your overall confidence level on guidance, given that you brought that higher. And clearly that implies some strong numbers in the back half of the year, and so I was hoping maybe you could go through your confidence level, maybe on a specific line item basis, just things to think about as we move through this year?

RICK PUCKETT: Absolutely. Absolutely there's a high confidence level in our revised estimates. So let me just kind of give you a few things. As we mentioned in the opening comments, we achieved the full integration of Baptista in terms of systems, and that's going to allow us to do a few things. It's going to allow us to really get after the logistics and manufacturing costs there, where we're manufacturing, and how we're shipping. We're also going to consolidate inventories into one location.

That should drive working capital improvements there that we haven't yet seen. We're also implementing some contract manufacturing with Late July in a couple of their locations. So that will drive some efficiencies in those locations. We're in the final stages of systems transition with our DSD system and that's going to continue to drive efficiencies. And we're taking actually a more aggressive activity in the back half of the year, whether it be in lower marketing and advertising spend relative to the revenue as it relates to Q1, and also this better mix focus that I talked about a few minutes ago.

So all of those things will add to the achievement of the estimates that we've revised to, and we're really confident, and you can hear it in Carl's voice, you can hear it in mine, you can hear it through the organization so there's a huge support for achieving these kinds of profitability numbers.

BRETT HUNDLEY: And that makes sense, and I guess as a quick follow-up to that, when I think about the ever evolving environment that you guys compete in, I mean, how do you rate the risk that later quarters maybe require an enhanced level of advertising spend, say, for instance, compared to what you have planned?

RICK PUCKETT: You know, it's possible. I mean, but we're, as you know, the number one brand in most of our categories. So we do kind of lead the category in a lot of different ways. You know, one of the things that has plagued us in the past, are commodities. Commodities are pretty much given for the rest of the year for us. And so there's not a lot of risk in the commodity side, on the manufacturing side. We don't have major capital projects going on right now that would create significant change in our manufacturing environment.

So we're past a lot of that stuff and those are the kinds of things that would surprise us if you will, surprise is a bad word, but they would hit us unexpectedly in previous quarters. Big numbers. So as you know, it takes about \$1 million or a little bit more than that to impact our EPS by a \$0.01 so it's significant leverage that happens. But we're not seeing a lot of that ahead of us and while there's always risk associated with the future, some of the big items that were risks in the past have been mitigated.

BRETT HUNDLEY: And, Carl, I wanted to ask you about your crackers platform. Because it's a big business for you guys and you've done a lot of work there, and I hate to use this phrase, but do you think that you have turned a

corner, so to speak, with that brand and given the size that you are and the category, do you think that you're doing the necessary things to evolve that category, maintain relevance and grow it sustainably?

CARL LEE: I think the answer clearly is yes, Brett. I'll give you a little more color around it. I think you've been patient with us, we talked about it over a year, we were going through a major renovation process for our Lance sandwich crackers. We changed the overall packaging design, the packaging format and went to the closed box. That was all part of our strategy and part of our longer term plan. So we're seeing that pay out for our base business now. As I mentioned the past 13 weeks we've seen very positive trends as the new box takes hold. But it was bigger than just the current Lance sandwich crackers that you're so familiar with and we've all enjoyed for many, many years.

Because of that renovation, because of the willingness to take some short-term pain we've been able to reposition that platform to launch a lot of new items. Quick starts is something that you saw many some of the photographs earlier, that is a powerful new opportunity for us to take the equipment and the manufacturing expertise with sandwich crackers and deliver a great, nutritional morning breakfast item and the retail acceptance and consumer acceptance so far has just been absolutely above what even I had high expectations on and the ability to continue to expand that.

That's one area in particular that some retailers have come to us and asked us to increase our number of offerings there. And we've been able to team up with some retailers in short order with a request that basically arrived in January for some (inaudible) that have to be in place for summer to add additional SKUs in that area. So we see the traditional Lance sandwich cracker platform as bigger than what we're all familiar with and we've seen the launch of Bolds be supportive and successful, and we've seen the launch of quick starts really open up a whole new opportunity for us. So we see it as an expanding and growing category.

BRETT HUNDLEY: Appreciate those comments, and, excuse me, if I can sneak one in to either of you. As we think about capital allocation for the Company, internal investment, coming in from the money that you've spent in recent years, your dividend is serviceable. Are there attractive options across the marketplace for you right now regarding M&A or do you think that capital would be better served in some form of payment to shareholders? I mean you're clearly growing, you know, map spending, stepping up, but I'm just curious if further deals are more prohibitive right now or if there are, you know, attractive options out there? Thank you.

CARL LEE: Brett, I'll start that answer. You know, as you indicate, we are spending less capital internally now as we've gotten past a lot of our major projects and you're seeing that, you know, represented in our guidance as it relates to capital expenditures coming down significantly from the last couple of years. So our goal is to continue to invest in the top line growth first and that certainly is demonstrated as we look at supporting new product launches with trades and advertising and some other things. But it would also be, being active in the M&A market. And certainly while we don't comment on the status of any of that, we are active and we are knowledgeable about what is going on. And I think that continues to be our primary goal rather than looking at a dividend or looking at share buy back or things of that nature.

BRETT HUNDLEY: Thank you.

CARL LEE: Thank you, Brett.

OPERATOR: Thank you. And our next question is from Akshay Jagdale with KeyBanc. Your line is open.

AKSHAY JAGDALE, ANALYST, KEYBANC CAPITAL MARKETS: Thanks. Good morning.

CARL LEE: Good morning. How are you?

AKSHAY JAGDALE: Good, good. Hope all is well. My first question, Rick, on page 5, which is a breakdown between brand and partners and other revenues.

RICK PUCKETT: Yes.

AKSHAY JAGDALE: Did you reclassify something, I think it's Baptista, right? Can you just remind us what, if there was any reclassification there that happened? I have another number that was much, much larger, much higher before you sold the private brand business.

RICK PUCKETT: Yes. If you're talking about from last year, there were a lot of reclassification's that occurred as a result of the disposition of private brands and the acquisition of Baptista, as well as the acquisition of the consolidation of Late July because Late July was other category last year as we manufactured in a contract manufacturing capacity.

This year it's in the branded category. Similarly, if you look at the other category this year, that includes mostly the Baptista's contract manufacturing with products that are not snack factory or **pretzel crisp**. So the **pretzel crisp** and the snack factory components are in the branded category. Partner brands remained pretty constant year over year. With the exception of Late July because we actually distributed Late July last year as well (inaudible) we're not consolidating. So there have been a number of ins and outs and what this represents is a true apples and apples comparison.

AKSHAY JAGDALE: Okay. Good. I don't know if you commented on within branded core versus allied, can you give us some sense of how the core grew versus allied brands?

RICK PUCKETT: Well, we did talk about the core brand growth was 6.6%, but if you look at volume growth it was 8.6% growth so we had two points of negative pricing and that was primarily driven by the trade piece that we talked about as it relates to the P&L.

If you look at the organic growth across core brands, that was actually close to 6%, which is a pretty healthy organic growth for our core brands, which we've excluded the acquisition of Late July, if you will. Then if you look at the rest of branded or total branded, total branded grew by 5% for the year as you see on the page but that actually was close to 7% on a volume basis. So that's, essentially, as far as we go in terms guidelines of breaking out the (multiple speakers)

AKSHAY JAGDALE: That's helpful. Thank you. And then going back to Brett's question on the guidance and what it implies for the rest of the year. So, you know, it definitely implies that margins will improve pretty significantly in the back half, EBIDTA margin. I'm assuming the main thing that's going to happen there is the SG&A, the sales is going to be lower as a result of the ad spending that's moved around from a timing perspective into the first half. Is that the right way to think about it?

RICK PUCKETT: I think we'll see margin expansion in the gross margin as well as we get trade into a more optimized level. But, yes, I mean, a lot of the improvements will come from the SG&A component as we take advantage of the cost reductions and logistics in manufacturing with the finalized consolidation of Baptista and Late July. So those will help drive and some of the SG&A expenses will also be reduced as we continue to get efficiencies from our systems.

AKSHAY JAGDALE: Okay. And one sort of broader question. You've done a really good job overall strategically making the portfolio more focused on branded and brands that you own and selling off the private brands business. Can you just remind us strategically where we stand on partner brands? I mean, I know it's a very important component of making sure that DSD system has the vitality that it needs, but, can you just remind us on the importance of having private brands, it's growing nicely but it's not a huge profit center, correct?

CARL LEE: Akshay, thanks for the question. I think that you highlighted a lot of our key components of our strategic plan and one of them is our partner brand relationships. We operate a national DSD system and it's very important for us to make sure we've got the scale and reach day in and day out to support our own brands as we continue to add routes, as we continue to grow this system and to do that efficiently for ourselves, for our partners and for the retailers is to do some consolidation on distribution and to us to bring in partner brands as we're bringing in our own brands.

It really does create a win/win for everyone involved so it's an important part of our business, allows to us participate in some categories where we do not have brands or do not have capabilities. Like carrying partner brands that are complimentary allows us to get into stores more frequently and spend more time when we're in the stores selling because we've got a larger drop size that supports our very important partner, which is our independent business operators, or IBOs. So it's an important piece of our strategy and one that we want to continue to support and grow.

AKSHAY JAGDALE: Okay. And just along similar lines, can you just look back and grade yourself on the acquisitions that you've made and maybe talk about the DSD network and its importance from the standpoint of future acquisitions? Because some of the ones you made recently haven't really leveraged that asset. I mean, they've been good acquisitions but they haven't leveraged what I think is one of your most important assets and where you have the most opportunity to unlock value.

So can you just look back and give us a little look back at how you would judge your, sort of, your acquisitions and how you allocated capital there and then just talk more broadly about M&A? But more importantly like the DSD asset and the context of that. Thank you.

CARL LEE: Thank you, Akshay, I'll be glad to answer that question. I think that if you take a look back at our acquisition strategy and the ones that we've executed, I'd give us very high marks because I think that we're a very, very disciplined buyer. Because we have a wide reach with our partner brand coverage and our retail coverage, we get a chance to look at every brand that's out there that's for sale. Some we participate in and some we pass on.

But we do grow aggressively after the ones that fit our strategic model and our strategic plan. To kind of get into the DSD, I mean we went after snack factory aggressively and snack factory brought in a lot of things we didn't have. It allowed us to begin to focus on the perimeter. It brought in a really creative product innovative product that caters to some consumer needs that we see continuing to emerge.

It brought in some unique positions to play in the store and some unique places to play with new retailers. So while that one may not be leveraging DSD head on it's allowed us to get out there and build a perimeter sales force that we think is very important to us for the future. You've heard me say before it allows us to build our second set of railroad tracks, first being the railroad tracks for DSD to center of store, and new railroad tracks now to the perimeter store and areas that are not necessarily DSD friendly.

You take a look at Late July and comments were made earlier about Late July is performing quite well, that's again because of a great brand, great partnership, but also because of our DSD capability and DSD muscle. A lot of the ACB gains that we're seeing relate to (inaudible) are made possible because of our DSD system. So that's one been that's really played well to our DSD capability. So we are looking for some more M&A opportunities. We're going to be very selective and very careful, we're going to be very disciplined. When we do buy we like to buy something that checks several boxes, provides a good brand, provides a good platform, provides a DSD opportunity, may provide access to new consumers, provide access to new customers.

So we're going to continue to do that but we're going to be very, very disciplined about it. We would like to see a few more come in that really match up with our DSD. But we're going to be selective on what we want to acquire.

RICK PUCKETT: I would say, I would agree 100% with that and I would even add that Baptista, even though it's more of a manufacturing kind of an acquisition, it is able to manufacture things that go on DSD. If you think about the kinds of innovation that we had this year as a result of having Baptista in the family we were able to put out Cape Cod, we were able to put out some new Snyder's of Hanover brands as well potentially other brands in the future that will go in our DSD system. So I would agree with Carl 100%.

I think you'd have to give us some pretty high marks on our disciplined approach to acquisitions to make sure they're consistent with our strategy as well as our capabilities around integrating those and getting the synergy's from them.

AKSHAY JAGDALE: Okay. Thank you. I'll pass it on.

CARL LEE: Thanks again, Akshay.

OPERATOR: Thank you, and our next question is from Amit Sharma with BMO Capital Markets. Your line is open.

AMIT SHARMA: Hi, guys. Thanks for the follow-up. Rick, you provided a little bit of seasonality. Can you please provide it for both top line and EPS for the rest of the three quarters?

RICK PUCKETT: I had to really looked at the top line in percentages like that, Amit. So I apologize, I don't have that with me. So it will be similar, though, although I think what you'll see is improving gross margins and improving SG&A margins against revenue for the rest of the year, but I don't have that specific information.

AMIT SHARMA: All right. Thank you.

OPERATOR: Thank you. (Operator Instructions). Our next question is from Jonathan Feeney with Athlos. Your line is open.

JONATHAN FEENEY, ANALYST, ATHOS RESEARCH: Good morning, guys. Thanks very much.

CARL LEE: Jonathan.

RICK PUCKETT: Hey, Jonathan.

JONATHAN FEENEY: Just one real detailed question. I'm trying to understand, you talked a little bit about costs and I'm trying to understand specifically how the COGS works here. You talked about, it seemed optically, it seems like a lot of these grain costs are coming down pretty significantly and at least on a year over year basis, but I know you've got some additions of new product in there and your COGs is up about 9.6%. Can you give us a sense what your cost per unit has done in this quarter and what that should do for the remainder of the years for modeling purposes?

RICK PUCKETT: Jonathan, I think a lot of the COGs percent is driven by the trade activity because the COGs percent is a percentage of net revenue, not gross revenue, right, that you see. So I think that's what's driving most of the changes. We agree with you that the input costs are not varying dramatically, but we'd also suggest that we have some opportunities in branded mix to focus on as well to continue to drive even more improved gross margins. But I would suggest to you that most of the difference that you're seeing is coming from trade.

JONATHAN FEENEY: I guess what I was referring to, Rick, is the absolute amount of COGs. Can you give us a sense, can you give us a sense of whether your costs per unit are up or down and what that should be for the rest of the year?

RICK PUCKETT: Well, I don't think our cost per unit has, I mean, it obviously varies across the whole Company because we have so many products across so many different plans. What we are looking to do is to optimize our costs per unit in particular categories, not just in terms of manufacturing, but also in terms of delivered costs. So as we think about the new line that we just put in Goodyear, Arizona, that allows us to take some product that was being shipped west from Pennsylvania and put that into Arizona or other types of products that would be going west.

So we're looking at delivered costs per unit and that's our focus but there's nothing really significantly different in our cost per unit other than the benefits that we're getting from our increased investments over the last couple of years.

JONATHAN FEENEY: So there shouldn't be much in the way of tailwind from input costs you expect even though there's big buckets of your cost structure that are down on a spot basis?

RICK PUCKETT: I think that we will see input costs materialize over the next six months. As you know, we tend to be out six months or so.

Q1 2015 Snyder'sLance Inc Earnings Call - Final

JONATHAN FEENEY: I got you. Okay. Thanks very much.

CARL LEE: Thank you, Jonathan.

OPERATOR: Thank you, and our last question is from Michael Gallo with CL King. Your line is open.

MICHAEL GALLO, ANALYST, CL KING & ASSOCIATES: Hi, good morning.

RICK PUCKETT: Good morning, Mike.

CARL LEE: Hi, Mike.

MICHAEL GALLO: Just wanted to delve in on I think at the time that you divested private brands you talked about the ability to reduce costs by \$22 million to \$25 million. I was wondering if you can give us an update on where you are in that, how much of that you've gotten as of the end of the first quarter and what's still ahead of you? Then I was also wondering if you saw any benefit in the first quarter to the revenue line as a result of the earlier Easter? Thanks.

CARL LEE: You want to take the first, or the last one?

RICK PUCKETT: Yes. Mike, in regards to Easter, we really didn't single that out as an event as far as movement with our revenue line. We're going through a, we're overlapping a 53rd week from last year so that creates a little bit of noise. The transition of holidays create a little bit noise. With us running a DSD system primarily it really balances it out so we didn't see much of an impact to our advantage or disadvantage with the holiday shifting.

CARL LEE: I mean, Easter is more about chocolate candy and some other things rather than the snacks that we kind of manufacture. As it relates to our margin improvement and restructuring plan that we announced last year, we believe we're around somewhere 50% to 60% there. The things I mentioned before are still ahead of us that we are tackling and, including the consolidation of logistics and manufacturing in certain areas with our Baptista's organization as well as our Late July organization and the additional efficiencies through systems implementations.

So we're make great progress. We're not quite there yet, but we did say it was going to take us about 12 to 18 months to get there so we're not quite to that 12 to 18 month period yet.

MICHAEL GALLO: Okay. Thank you.

OPERATOR: Thank you. And I'm not showing any further questions that the time. I'll now turn the call back over to Carl Lee, President and CEO.

CARL LEE: Bridget, thank you. Appreciate that. I wanted to again thank everybody for joining us on our call today. We're excited to be able to share with you some very good news for our first quarter. I think we talked about we saw very strong revenue growth driven by both our innovation of our new products, innovation on some of our core brands and now this concept of our balanced portfolio where we continue to make sure we support and grow all of our brands and leverage them as possible to reach more consumers. I think as you take a look at costs we'll continue to be very aggressive there, we saw some nice leverage across our SG&A line for the first quarter.

We'll continue to push hard to leverage it more as we go through the back half of the year. We saw our COGS up on a dollar basis, not so much on a percentage basis as we supported new item, supported some of the new lines that we had to put into plants from higher depreciation as we really expanded our capability and our possibility of future through put with all you have our plants. So we're going to keep a very close eye on our cost system and cost basis to make sure we continue to bring that in line as aggressively as we can while we continue to lean in to advertising and marketing, also begin to lean in on our R&D capabilities. And continue to build our railroad tracks both our DSD system that we're proud to have nationwide and also our new distribution system that allows us to be able to go the perimeter with snack factory and some of the other items there.

Q1 2015 Snyder'sLance Inc Earnings Call - Final

So we've worked hard to position our Company well. We're glad to serve and you serve our shareholders and we again want to thank you for being on this call with us for the past hour and we wish everybody a very good Friday. Have a blessed day. Thank you.

OPERATOR: Ladies and gentlemen, thank you for participating in today's conference. This does conclude the program and you may all disconnect. Everyone have a great weekend.

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In the conference calls upon which Event Transcripts are based, companies may make projections or other forward-looking statements regarding a variety of items. Such forward-looking statements are based upon current expectations and involve risks and uncertainties. Actual results may differ materially from those stated in any forward-looking statement based on a number of important factors and risks, which are more specifically identified in the companies' most recent SEC filings. Although the companies may indicate and believe that the assumptions underlying the forward-looking statements are reasonable, any of the assumptions could prove inaccurate or incorrect and, therefore, there can be no assurance that the results contemplated in the forward-looking statements will be realized.

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May 8, 2015 Friday 10:00 AM GMT

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DOW JONES NEWWIRES

Length: 3463 words

Body

8 May 2015 06:00 ET *Snyders-Lance 1Q Net \$10.6M >LNCE

8 May 2015 06:00 ET *Snyders-Lance 1Q Rev \$402.3M >LNCE

8 May 2015 06:00 ET Press Release: Snyder's-Lance, Inc. Reports Results for First Quarter 2015

Snyder's-Lance, Inc. Reports Results for First Quarter 2015

- First quarter net revenue of \$402 million, an 8% increase over prior year
- First quarter 2015 earnings per diluted share of \$0.17 excluding special items
- First quarter 2015 earnings per diluted share of \$0.15 including special items
- Makes positive adjustment to 2015 financial estimates
- Declares quarterly dividend of \$0.16 per share of common stock

PR Newswire

CHARLOTTE, N.C., May 8, 2015

CHARLOTTE, N.C., May 8, 2015 /PRNewswire/ -- Snyder's-Lance, Inc. (Nasdaq-GS: LNCE) today reported first quarter net revenue growth of 8% over last year, with earnings of \$0.17 per diluted share excluding special items.

"We are pleased with our good start to the year with healthy top line growth and earnings that met our expectations. Our 'better for you' and premium products are working well, delivering solid sales and financial results," said Carl E. Lee, Jr., President and CEO. "With a balanced portfolio of great snacks, we have momentum that helped us to outpace our categories with an 8% overall top line growth compared to last year. This year is off to a great start and we continue to invest in advertising and retail execution to reach more consumer households and leverage our innovative new products to drive category growth. New products such as our Cape Cod(R) Dipping Shells, Snyder's of Hanover(R) Poppers and Lance(R) Quick Starts are gaining wide acceptance as we gain new users and expand

snacking day parts. Lance(R) Gluten Free Sandwich Crackers, which were introduced at Natural Products Expo West with great acceptance, are an example of how our innovation is working and creating a lot of excitement with consumers. Our Clearview Foods(TM) division, which includes Snack Factory(R) **Pretzel Crisps(R)** , EatSmart(TM) and Late July(R) Organic Snacks, has received an exceptional reception from retailers and continues to grow at a healthy rate. We also saw good top line strength widely across the balance of our portfolio, led by Cape Cod(R) Kettle Chips which posted very strong growth again this quarter."

Mr. Lee continued, "From an earnings point of view, our results are slightly ahead of our expectations even with a higher investment in marketing and advertising for the quarter. Comparisons year over year are skewed by the difference in the tax rate for last year providing a \$0.02 per diluted share advantage to last year. It's a great time to be a part of the Snyder's-Lance team, and I'm very grateful to all our associates for their leadership and passion to win."

First Quarter Financial Summary

- Net revenue for the first quarter of 2015 was \$402 million, an increase of 7.9% compared to first quarter of 2014 net revenue of \$373 million.
- Net income excluding special items for the first quarter of 2015 was \$12.0 million, or \$0.17 per diluted share, as compared to net income excluding special items of \$11.9 million for first quarter of 2014, or \$0.17 per diluted share.
- Including special items, net income for the first quarter of 2015 was \$10.6 million, or \$0.15 per diluted share, as compared to net income including special items of \$10.5 million for the first quarter of 2014, or \$0.15 per diluted share.
- Special items for the first quarter of 2015 included after-tax expenses of \$1.3 million primarily associated severance charges and professional fees. Special items for the first quarter of 2014 included after-tax expenses of \$1.4 million primarily associated with impairment charges and certain acquisition related costs.

Dividend Declared

The Company also announced the declaration of a quarterly cash dividend of \$0.16 per share on the Company's common stock. The dividend is payable on May 29, 2015 to stockholders of record at the close of business on May 21, 2015.

Estimates for 2015

Management updated Company estimates for 2015, with net revenue for the full year now expected to be in the range of \$1.69 to \$1.72 billion, from the previous estimate of \$1.68 to \$1.72 billion. The earnings per diluted share estimates range has been adjusted to \$1.11 to \$1.19, from the previous estimate of \$1.09 to \$1.19. Capital expenditures for 2015 are now projected to be between \$60 and \$62 million, from the previous estimate of \$60 to \$65 million.

Conference Call

Management will conduct a conference call and live webcast at 9:00 am eastern time on Friday, May 8, to review the Company's first quarter 2015 results. The conference call and accompanying slide presentation will be webcast live through the Investor Relations section of the Company's website, www.snyderslance.com . In addition, the slide presentation will be available at www.snyderslance.com to download and print approximately 30 minutes before the webcast. To participate in the conference call, the dial-in number is (844) 830-1960 for U.S. callers or (315) 625-6883 for international callers. The conference ID is 25419324. A continuous telephone replay of the call will be available between 12:00pm on May 8 and midnight on May 15. The replay telephone number is

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(855) 859-2056 for U.S. callers or (404) 537-3406 for international callers. The replay access code is 25419324. Investors may also access a web-based replay of the conference call at www.snyderslance.com.

About Snyder's-Lance, Inc.

Snyder's-Lance, Inc., headquartered in Charlotte, NC, manufactures and markets snack foods throughout the United States and internationally. Snyder's-Lance's products include pretzels, sandwich crackers, pretzel crackers, potato chips, cookies, tortilla chips, restaurant style crackers, nuts and other snacks. Snyder's-Lance has manufacturing facilities in North Carolina, Pennsylvania, Indiana, Georgia, Arizona, Massachusetts, Florida, Ohio and Wisconsin. Products are sold under the Snyder's of Hanover(R), Lance(R), Cape Cod(R), Snack Factory(R) **Pretzel Crisps(R)**, Late July(R), Krunchers!(R), Tom's(R), Archway(R), Jays(R), Stella D'oro(R), Eatsmart(TM), O-Ke-Doke(R), and other brand names along with a number of third party brands. Products are distributed nationally through grocery and mass merchandisers, convenience stores, club stores, food service outlets and other channels. LNCE-E

Cautionary Information about Forward Looking Statements

This press release contains statements which may be forward looking within the meaning of applicable securities laws. The statements include projections regarding future revenues, earnings and other results which are based upon the Company's current expectations and assumptions, which are subject to a number of risks and uncertainties. Factors that could cause actual results to differ include general economic conditions or an economic turndown; volatility in the price or availability of inputs, including raw materials, packaging, energy and labor; price competition and industry consolidation; changes in our top retail customer relationships; inability to maintain profitability in the face of a consolidating retail environment; failure to successfully integrate acquisitions or execute divestitures; loss of key personnel; failure to execute and accomplish our strategy; concerns with the safety and quality of certain food products or ingredients; adulterated, misbranded or mislabeled products or product recalls; disruption of our supply chain; inadequacies in, or security breaches of, our information technology systems; improper use of social media; changes in consumer preferences and tastes or inability to innovate or market our products effectively; reliance on distribution through a significant number of independent business owners; protection of our trademarks and other intellectual property rights; impairment in the carrying value of goodwill or other intangible assets; new regulations or legislation; interest rate volatility, and the interests of a few individuals who control a significant portion of our outstanding shares of common stock may conflict with those of other stockholders, which have been discussed in greater detail in our most recent Form 10-K and other reports filed with the Securities and Exchange Commission.

SNYDER'S-LANCE, INC. AND SUBSIDIARIES
Condensed Consolidated Statements of Income (Unaudited)
For the Quarters Ended April 4, 2015 and March 29, 2014

	Quarter Ended	
	April 4, 2015	March 29, 2014
(in thousands, except per share data)		
Net revenue	\$402,341	\$ 373,016
Cost of sales	262,979	239,830
Gross margin	139,362	133,186
Selling, general and administrative	121,924	116,064
Impairment charges	--	1,000
Gain on sale of route businesses, net	(793)	(1,163)
Other (income)/expense, net	(736)	80
Income before interest and income taxes	18,967	17,205
Interest expense, net	2,467	3,390

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Income before income taxes	16,500	13,815
Income tax expense	5,918	3,326
Income from continuing operations	10,582	10,489
Income from discontinued operations, net of income tax	--	6,322
Net income	10,582	16,811

8 May 2015 06:00 ET Press Release: Snyder's-Lance, Inc. Reports -2-

Net loss attributable to noncontrolling interests	(54)	(5)
Net income attributable to Snyder's-Lance, Inc.	\$ 10,636	\$ 16,816
	=====	=====
Amounts attributable to Snyder's-Lance, Inc.:		
Continuing operations	\$ 10,636	\$ 10,494
Discontinued operations	--	6,322
Net income	\$ 10,636	\$ 16,816
	=====	=====
Basic earnings per share:		
Continuing operations	\$ 0.15	\$ 0.15
Discontinued operations	--	0.09
Total basic earnings per share	\$ 0.15	\$ 0.24
	=====	=====
Diluted earnings per share:		
Continuing operations	\$ 0.15	\$ 0.15
Discontinued operations	--	0.09
Total diluted earnings per share	\$ 0.15	\$ 0.24
	=====	=====
Cash dividends declared per share	\$ 0.16	\$ 0.16

SNYDER'S-LANCE, INC. AND SUBSIDIARIES
Condensed Consolidated Balance Sheets (Unaudited)
As of April 4, 2015 and January 3, 2015

(in thousands, except share data)	April 4, 2015	January 3, 2015
ASSETS	-----	-----
Current assets:		
Cash and cash equivalents	\$ 12,389	\$ 35,373
Restricted cash	966	966
Accounts receivable, net of allowances of \$1,757 and \$1,778, respectively	134,220	126,093
Inventories	123,517	116,236
Prepaid income taxes	9,806	4,175
Deferred income taxes	14,076	13,189
Assets held for sale	12,279	11,007
Prepaid expenses and other current assets	20,493	22,112
Total current assets	327,746	329,151
Noncurrent assets:		

***Snyders-Lance 1Q EPS 15c >LNCE**

Fixed assets, net	421,319	423,612
Goodwill	540,726	541,539
Other intangible assets, net	541,671	545,212
Other noncurrent assets	24,016	23,874
Total assets	\$1,855,478	\$1,863,388
	=====	=====

LIABILITIES AND STOCKHOLDERS' EQUITY

Current liabilities:

Current portion of long-term debt	\$ 8,541	\$ 8,561
Accounts payable	58,048	57,407
Accrued compensation	25,203	32,774
Accrued casualty insurance claims	4,096	4,320
Accrued selling and promotional costs	12,100	13,141
Other payables and accrued liabilities	24,376	24,723
	-----	-----
Total current liabilities	132,364	140,926

Noncurrent liabilities:

Long-term debt	436,261	438,376
Deferred income taxes	169,479	168,593
Accrued casualty insurance claims	13,629	13,755
Other noncurrent liabilities	15,870	15,030
	-----	-----
Total liabilities	767,603	776,680

Commitments and contingencies

Stockholders' equity:

Common stock, \$0.83 1/3 par value.		
Authorized 110,000,000 shares; 70,587,344 and 70,406,086 shares outstanding, respectively	58,820	58,669
Preferred stock, \$1.00 par value.		
Authorized 5,000,000 shares; no shares outstanding	--	--
Additional paid-in capital	779,916	776,930
Retained earnings	232,184	232,812
Accumulated other comprehensive loss	(2,295)	(1,007)
	-----	-----
Total Snyder's-Lance, Inc. stockholders' equity	1,068,625	1,067,404
Noncontrolling interests	19,250	19,304
	-----	-----
Total stockholders' equity	1,087,875	1,086,708
Total liabilities and stockholders' equity	\$1,855,478	\$1,863,388
	=====	=====

SNYDER'S-LANCE, INC. AND SUBSIDIARIES

Condensed Consolidated Statements of Cash Flows (Unaudited)
For the Quarters Ended April 4, 2015 and March 29, 2014

	Quarter Ended	
	April 4, 2015	March 29, 2014
(in thousands)		
Operating activities:		
Net income	\$ 10,582	\$ 16,811
Adjustments to reconcile net income to cash from operating activities:		

***Snyders-Lance 1Q EPS 15c >LNCE**

Depreciation and amortization	17,413	14,654
Stock-based compensation expense	1,350	1,514
Loss on sale of fixed assets, net	12	136
Gain on sale of route businesses, net	(793)	(1,163)
Gain on sale of investments	(436)	--
Impairment charges	--	1,000
Deferred income taxes	524	154
Provision for doubtful accounts	236	363
Changes in operating assets and liabilities	(28,903)	(7,870)
Net cash (used in)/provided by operating activities	(15)	25,599
<hr/>		

Investing activities:

Purchases of fixed assets	(13,495)	(17,242)
Purchases of route businesses	(6,731)	(4,393)
Proceeds from sale of fixed assets	302	165
Proceeds from sale of route businesses	7,870	6,364
Proceeds from sale of investments	436	--
<hr/>		
Net cash used in investing activities	(11,618)	(15,106)
<hr/>		

Financing activities:

Dividends paid to stockholders	(11,264)	(11,202)
Issuances of common stock	2,589	2,481
Repurchases of common stock	(801)	(1,152)
Repayments of long-term debt	(1,875)	(4,062)
Net repayments of existing credit facilities	--	(5,000)
Net cash used in financing activities	(11,351)	(18,935)
<hr/>		

Decrease in cash and cash equivalents	(22,984)	(8,442)
Cash and cash equivalents at beginning of period	35,373	14,080
Cash and cash equivalents at end of period	\$ 12,389	\$ 5,638
<hr/>		

Supplemental information:

Cash paid for income taxes, net of refunds of \$425 and \$--, respectively	\$ 10,412	\$ 3,795
Cash paid for interest	\$ 1,246	\$ 2,126

SNYDER'S-LANCE, INC. AND SUBSIDIARIES

Reconciliation of Non-GAAP Measures (Unaudited)

For the Quarters Ended April 4, 2015 and March 29, 2014

		Per
	Net of	Diluted
(in thousands, except per share data)	Tax	Share
<hr/>		
Quarter Ended April 4, 2015		
Net income attributable to Snyder's-Lance, Inc.	\$10,636	\$ 0.149
Severance charges	511	0.007
Legal fees - "All Natural" litigation	582	0.008
Professional fees	228	0.004
<hr/>		
Net income attributable to Snyder's-Lance, Inc., excluding special items	\$11,957	\$ 0.168

*Snyders-Lance 1Q EPS 15c >LNCE

Quarter Ended March, 29, 2014		
Income from continuing operations	\$10,494	\$ 0.148
Impairment charges	631	0.009
Self-funded medical insurance claim	564	0.008
Professional fees	214	0.003
	=====	=====
Income from continuing operations, excluding special items	\$11,903	\$ 0.168
	=====	=====

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To view the original version on PR Newswire, visit: <http://www.prnewswire.com/news-releases/snyders-lance-inc-reports-results-for-first-quarter-2015-300080117.html>

SOURCE Snyder's-Lance, Inc.

Web site: <http://www.snyderslance.com>

8 May 2015 06:02 ET *Snyders-Lance Narrows FY View To Rev \$1.69B-\$1.72B >LNCE

8 May 2015 06:03 ET *Snyders-Lance Narrows 2015 View To EPS \$1.11-EPS \$1.19 >LNCE

8 May 2015 06:03 ET *Snyders-Lance Now Sees 2015 Capex \$60M-\$62M >LNCE

8 May 2015 06:04 ET *Snyders-Lance 1Q Adj EPS 17c >LNCE

8 May 2015 06:04 ET *Snyders-Lance Says Top-Line Growth, Earnings Met Expectations

(MORE TO FOLLOW) Dow Jones Newswires (212-416-2800)

May 08, 2015 06:04 ET (10:04 GMT)

Notes

PUBLISHER: Dow Jones & Company, Inc.

Load-Date: May 9, 2015

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FORM 8-K: SNYDER'S-LANCE, INC FILES Current report

US Official News

May 8, 2015 Friday

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Length: 1100 words

Dateline: Washington

Body

SNYDER'S-LANCE, INC, North Carolina, has filed FORM 8-K (Current report) with Securities and Exchange Commission on May 08, 2015

State or other Jurisdiction of Incorporation: North Carolina

Item 2.02. Results of Operations and Financial Condition.

On May 8, 2015, Snyder's-Lance, Inc. (the "Company") issued a press release with respect to its financial results for the first quarter ended April 4, 2015. A copy of the press release is being furnished as Exhibit 99.1 hereto. The Company will also hold a conference call and live webcast on May 8, 2015 to discuss its financial results. The press release contains forward-looking statements regarding the Company and includes cautionary statements identifying important factors that could cause actual results to differ materially.

The exhibit attached hereto also presents measures not derived in accordance with generally accepted accounting principles ("GAAP"). The Company believes these non-GAAP financial measures provide useful information to investors as the measures emphasize core on-going operations and are helpful in comparing past and present operating results. The Company uses these measures to evaluate past performance and prospects for future performance. The presentation of non-GAAP financial measures by the Company should not be considered in isolation or as a substitute for the Company's financial results prepared in accordance with GAAP.

The information furnished under this Item 2.02 shall not be deemed "filed" for purposes of Section 18 of the Securities Exchange Act of 1934, nor shall it be deemed incorporated by reference in any filing under the Securities Act of 1933, except as shall be expressly set forth by specific reference in a filing.

Item 9.01. Financial Statements and Exhibits.

(d) Exhibits

Exhibit No.

FORM 8-K: SNYDER'S-LANCE, INC FILES Current report

Exhibit Description

99.1

Press Release, dated May 8, 2015, with respect to the Company's financial results for the first quarter ended April 4, 2015.

The information furnished as exhibits hereto shall not be deemed to be "filed" for purposes of Section 18 of the Securities and Exchange Act of 1934, nor shall it be deemed incorporated by reference in any filing under the Securities Act of 1933, except as shall be expressly set forth in specific reference in a filing.

Snyder's-Lance, Inc. Reports Results for First Quarter 2015

•

First quarter net revenue of \$402 million, an 8% increase over prior year

•

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•

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FORM 8-K: SNYDER'S-LANCE, INC FILES Current report

Late July® Organic Snacks, has received an exceptional reception from retailers and continues to grow at a healthy rate. We also saw good top line strength widely across the balance of our portfolio, led by Cape Cod® Kettle Chips which posted very strong growth again this quarter."

Mr. Lee continued, "From an earnings point of view, our results are slightly ahead of our expectations even with a higher investment in marketing and advertising for the quarter. Comparisons year over year are skewed by the difference in the tax rate for last year providing a \$0.02 per diluted share advantage to last year. It's a great time to be a part of the Snyder's-Lance team, and I'm very grateful to all our associates for their leadership and passion to win."

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•

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•

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•

Special items for the first quarter of 2015 included after-tax expenses of \$1.3 million primarily associated severance charges and professional fees. Special items for the first quarter of 2014 included after-tax expenses of \$1.4 million primarily associated with impairment charges and certain acquisition related costs.

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For more information please visit: <http://www.sec.gov>

In case of any query regarding this article or other content needs please contact: editorial@plusmediasolutions.com

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Snyder's-Lance Q1 earnings miss Wall Street expectations

Charlotte Observer (North Carolina)

May 8, 2015 Friday

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The Charlotte Observer

Found on Charlotte.com

Section: business

Length: 351 words

Byline: Katherine Peralta

The Charlotte Observer

Body

Charlotte-based snackmaker Snyder's-Lance reported flat first quarter earnings Friday that missed analysts' expectations, but sales were up from a year ago thanks in part to growth of its "better-for-you" snacks.

For the first three months ending April 4, Snyder's-Lance reported earnings of \$12 million, or 17 cents a share, matching profit in the first quarter of 2014. Analysts surveyed by Bloomberg had forecasted first quarter 2015 earnings to be 19 cents a share.

First quarter sales were \$402 million, up 8 percent over the same period last year.

"We are pleased with our good start to the year with healthy top line growth and earnings that met our expectations," Carl Lee, the company's president and CEO, said in a .

Lee said compared with last year, this year's first quarter earnings were "skewed by the difference in the tax rate for last year," which provided a 2 cents-a-share advantage to last year.

Last year, which Lee has called "," included a number of deals for Snyder's-Lance as it expanded its foothold in the healthier snack market to meet evolving consumer demands.

About a year ago, the company announced the of its Private Brands business, which makes cookies and crackers, and the after-tax gain from the sale was a boost to yearly profits. Last May, the company also Baptista's Bakery, a Wisconsin private-label baked snack manufacturer known for its "better-for-you" snacks.

Last November, the company its investment in an organic chip company called Late July Snacks. Earlier this year, the company a new division called Clearview Foods, which is focused on healthier snacks, and an expansion into the gluten-free industry.

Lee said Friday that its healthier snacks and premium products, such as **Pretzel Crisps** and Lance Gluten Free Sandwich Crackers, are "working well, delivering solid sales and financial results."

Snyder's-Lance Q1 earnings miss Wall Street expectations

Snyder's-Lance upped its earnings guidance for 2015, calling for full-year earnings per share to be from \$1.11 to \$1.19, up from a previous estimate of \$1.09 to \$1.19. Analysts surveyed by Bloomberg forecast full-year earnings of \$1.15.

Peralta: 704-358-5079;

Load-Date: May 8, 2015

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Snyder's-Lance Reports Results for First Quarter 2015

India Retail News

May 8, 2015 Friday 6:30 AM EST

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Length: 793 words

Body

May 8 -- Snyder's-Lance, Inc. (Nasdaq-GS: LNCE) today reported first quarter net revenue growth of 8% over last year, with earnings of \$0.17 per diluted share excluding special items.

"We are pleased with our good start to the year with healthy top line growth and earnings that met our expectations. Our 'better for you' and premium products are working well, delivering solid sales and financial results," said Carl E. Lee, Jr., President and CEO. "With a balanced portfolio of great snacks, we have momentum that helped us to outpace our categories with an 8% overall top line growth compared to last year. This year is off to a great start and we continue to invest in advertising and retail execution to reach more consumer households and leverage our innovative new products to drive category growth. New products such as our Cape Cod Dipping Shells, Snyder's of Hanover Poppers and Lance Quick Starts are gaining wide acceptance as we gain new users and expand snacking day parts. Lance Gluten Free Sandwich Crackers, which were introduced at Natural Products Expo West with great acceptance, are an example of how our innovation is working and creating a lot of excitement with consumers. Our Clearview Foods division, which includes Snack Factory **Pretzel Crisps**, EatSmart and Late July Organic Snacks, has received an exceptional reception from retailers and continues to grow at a healthy rate. We also saw good top line strength widely across the balance of our portfolio, led by Cape Cod Kettle Chips which posted very strong growth again this quarter."

Mr. Lee continued, "From an earnings point of view, our results are slightly ahead of our expectations even with a higher investment in marketing and advertising for the quarter. Comparisons year over year are skewed by the difference in the tax rate for last year providing a \$0.02 per diluted share advantage to last year. It's a great time to be a part of the Snyder's-Lance team, and I'm very grateful to all our associates for their leadership and passion to win."

First Quarter Financial Summary

* Net revenue for the first quarter of 2015 was \$402 million, an increase of 7.9% compared to first quarter of 2014 net revenue of \$373 million.

* Net income excluding special items for the first quarter of 2015 was \$12.0 million, or \$0.17 per diluted share, as compared to net income excluding special items of \$11.9 million for first quarter of 2014, or \$0.17 per diluted share.

* Including special items, net income for the first quarter of 2015 was \$10.6 million, or \$0.15 per diluted share, as compared to net income including special items of \$10.5 million for the first quarter of 2014, or \$0.15 per diluted share.

* Special items for the first quarter of 2015 included after-tax expenses of \$1.3 million primarily associated with severance charges and professional fees. Special items for the first quarter of 2014 included after-tax expenses of \$1.4 million primarily associated with impairment charges and certain acquisition related costs.

Dividend Declared

Snyder's-Lance Reports Results for First Quarter 2015

The Company also announced the declaration of a quarterly cash dividend of \$0.16 per share on the Company's common stock. The dividend is payable on May 29, 2015 to stockholders of record at the close of business on May 21, 2015.

Estimates for 2015

Management updated Company estimates for 2015, with net revenue for the full year now expected to be in the range of \$1.69 to \$1.72 billion, from the previous estimate of \$1.68 to \$1.72 billion. The earnings per diluted share estimates range has been adjusted to \$1.11 to \$1.19, from the previous estimate of \$1.09 to \$1.19. Capital expenditures for 2015 are now projected to be between \$60 and \$62 million, from the previous estimate of \$60 to \$65 million.

Conference Call

Management will conduct a conference call and live webcast at 9:00 am eastern time on Friday, May 8, to review the Company's first quarter 2015 results. The conference call and accompanying slide presentation will be webcast live through the Investor Relations section of the Company's website, www.snyderslance.com. In addition, the slide presentation will be available at www.snyderslance.com to download and print approximately 30 minutes before the webcast. To participate in the conference call, the dial-in number is (844) 830-1960 for U.S. callers or (315) 625-6883 for international callers. The conference ID is 25419324. A continuous telephone replay of the call will be available between 12:00pm on May 8 and midnight on May 15. The replay telephone number is (855) 859-2056 for U.S. callers or (404) 537-3406 for international callers. The replay access code is 25419324. Investors may also access a web-based replay of the conference call at www.snyderslance.com.

Source: Snyder's-Lance

Load-Date: May 16, 2015

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PDIC promotes environment protection through benefit run

Philippines News Agency

May 6, 2015 Wednesday

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Length: 442 words

Dateline: MANILA

Body

ANILA, May 6 -- The Philippine Deposit Insurance Corporation (PDIC) is sponsoring 'Takbo 2: Tungo sa Kalusugan, Para sa Kalikasan', a benefit run for survivor-families of typhoon Yolanda and for heightening awareness on the importance of protecting the environment.

To be held on May 10, 2015 at the CCP Grounds in Pasay City, Takbo 2 is in support of PDIC's Corporate Social Responsibility (CSR) aimed at promoting the protection of the environment and balanced development of communities.

For this year's benefit run, PDIC is again collaborating with Gawad Kalinga Community Development Foundation, Inc. (GK) with the support of new partner, Miss Earth Foundation. The candidates for Miss Earth Philippines 2015 are joining Takbo 2.

Registration is ongoing at Chris Sports branches in Glorietta 3, Metro Market! Market!, SM Manila and SM North Annex until May 6, 2015 and at the PDIC office at the 8/F, SSS Building, Ayala Ave. cor V. A. Rufino St., Makati City until May 8, 2015. Takbo 2 has four-race distances, 1km, 3km, 5km and 10km, to cater to all types of running enthusiasts including children. Registration fee ranges from P200 to P600 per runner which entitles the runner to a race kit and finisher's lootbag. The public may still register at the information desk at CCP before the assembly time at 5:00 AM.

Proceeds from the benefit run will be turned over to GK for the construction of disaster-resilient houses in the PDIC-GK Village in Lawaan, Eastern Samar. Lawaan, a fifth class municipality in Eastern Samar, is located between badly-hit Tacloban City and Guiuan, Eastern Samar. Isolated for days since Yolanda struck, Lawaan also experienced a storm surge, powerful winds, and heavy rainfall. PDIC hopes to raise funds through Takbo 2 to build more houses for survivor-families.

Takbo 2 is supported by Appebon Kids Syrup, Brooks, Del Monte Philippines, Guitar Garments, Jack 'n Jill **Pretzel Crisps**, Magnolia Purewater, Philippine Postal Corporation, Rural Bankers Association of the Philippines, Saucony, St. Luke's Medical Center, The Generics Pharmacy, Tobys Sports and United Laboratories, Inc. Registration and event partners are Chris Sports and Metro Ad-vantage Media Marketing Services. Media partners include ABS-CBN Sports+Action, Lifestyle Network, BusinessWorld, HerWord.com, Manila Bulletin, Mellow 94.7 and DZRH.

For more information on Takbo 2, please visit the PDIC website, www.pdic.gov.ph or call PDIC at 841-4643.

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Load-Date: May 6, 2015

PDIC promotes environment protection through benefit run

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Press Release: Snyder's-Lance, Inc. Announces Results from Annual Meeting of Stockholders

Dow Jones Institutional News

May 6, 2015 Wednesday 6:30 PM GMT

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DOW JONES NEWSWIRES

Length: 426 words

Body

Snyder's-Lance, Inc. Announces Results from Annual Meeting of Stockholders

PR Newswire

CHARLOTTE, N.C., May 6, 2015

CHARLOTTE, N.C., May 6, 2015 /PRNewswire/ -- Snyder's-Lance Inc. (Nasdaq-GS:LNCE) today announced the results from its Annual Meeting of Stockholders held on May 6, 2015. The stockholders approved each of the proposals voted on at the meeting.

Election of Directors

The following nominees were elected to the Snyder's-Lance, Inc. Board of Directors to serve until the Annual Meeting of Stockholders in 2018:

-- Jeffrey A. Atkins

-- Peter P. Brubaker

-- Carl E. Lee, Jr.

-- Isaiah Tidwell

The following nominees were elected to the Snyder's-Lance, Inc. Board of Directors to serve until the Annual Meeting of Stockholders in 2016:

-- Lawrence V. Jackson

-- David C. Moran

The Board of Directors is currently comprised of twelve members.

Press Release: Snyder's-Lance, Inc. Announces Results from Annual Meeting of Stockholders

Advisory Vote on Executive Compensation

The stockholders approved the advisory resolution approving the compensation paid to Snyder's-Lance, Inc. named executive officers.

Ratification of Selection of PricewaterhouseCoopers LLP as Independent Public Accountants

The stockholders ratified the selection of PricewaterhouseCoopers LLP as the independent registered public accounting firm for fiscal year 2015.

About Snyder's-Lance, Inc.

Snyder's-Lance, Inc., headquartered in Charlotte, NC, manufactures and markets snack foods throughout the United States and internationally. Snyder's-Lance's products include pretzels, sandwich crackers, pretzel crackers, potato chips, cookies, tortilla chips, restaurant style crackers, nuts and other snacks. Snyder's-Lance has manufacturing facilities in North Carolina, Pennsylvania, Indiana, Georgia, Arizona, Massachusetts, Florida, Ohio and Wisconsin. Products are sold under the Snyder's of Hanover(R), Lance(R), Cape Cod(R), Snack Factory(R) **Pretzel Crisps(R)**, Late July(R), Krunchers!(R), Tom's(R), Archway(R), Jays(R), Stella D'oro(R), Eatsmart(TM), O-Ke-Doke(R), and other brand names along with a number of third party brands. Products are distributed nationally through grocery and mass merchandisers, convenience stores, club stores, food service outlets and other channels. LNCE-E

Logo - <http://photos.prnewswire.com/prnh/20150410/197788LOGO>

To view the original version on PR Newswire, visit: <http://www.prnewswire.com/news-releases/snyders-lance-inc-announces-results-from-annual-meeting-of-stockholders-300078808.html>

SOURCE Snyder's-Lance, Inc.

Web site: <http://www.snyderslance.com>

(END) Dow Jones Newswires

May 06, 2015 14:30 ET (18:30 GMT)

Notes

PUBLISHER: Dow Jones & Company, Inc.

Load-Date: May 7, 2015

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Snyder's-Lance, Inc. Announces Results from Annual Meeting of Stockholders

PR Newswire

May 6, 2015 Wednesday 2:30 PM EST

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Length: 383 words

Dateline: CHARLOTTE, N.C., May 6, 2015

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Snyder's-Lance, Inc. Announces Results from Annual Meeting of Stockholders

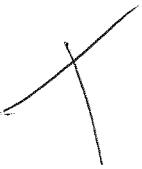
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SOURCE Snyder's-Lance, Inc.

CONTACT: Mark Carter, VP and Investor Relations Officer (704) 557-8386

Load-Date: May 7, 2015

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Food & Beverage - North America

Mergent Industry Reports

May 1, 2015

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Length: 12075 words

Body

Current Environment - US

Sector Overview

In the latter part of 2014 the US economy experienced its strongest economic growth since the financial crisis in 2007, climbing to 5% in the third quarter, although growth slowed in the final quarter. The global slump in oil prices benefited customers, but most preferred to save the money, which led to a drop in consumer spending and overall production, as reflected in lower sales volumes and profits in the F&B sector. A strong US dollar also led to slackened demand for overseas imports, particularly as the economic growth in China and Europe slowed.

The financial performance of leading companies in the sector was mixed, with most companies reporting relatively minor changes in sales and profits. Most companies' sales and revenues were lowered, while profits were offset by costs incurred from company restructuring, including the divestiture of unprofitable businesses as well as incorporation of new divisions, such as the new segment of Archer Daniels Midlands (NYSE: ADM), Wild Flavors, which is part of its venture into the specialty ingredient market.

Growth in the sector was spurred by companies' ventures into specialty niche markets, including ethnic markets such as kosher or halal food, as well as establishing their international presence through acquisitions of companies in developing economies like Vietnam and Egypt. Consumer trends continued to lean towards the use of premium, value-added foods with a focus on health and nutrition, and as a result companies have invested image building for their products in order to appeal to health conscious consumers.

For companies such as Coca-Cola Co (NYSE: KO), whose signature beverage Coca-Cola is known for its high sugar content, repositioning their product through changes in packaging and marketing campaigns was enforced, such as the introduction of variants like Coca-Cola Zero, as well as continuing to strengthen and expand their product portfolio, which includes energy drinks, tea-infused beverages and flavored water, among others.

Consumers' busy lifestyles continued to fuel growth through the range of needs emerging as lifestyles and eating habits become more varied, resulting in the popularity of snack foods and packaging targeted towards people on-the-go, while increased health awareness has also led to the importance of adequate labeling, food safety standards, and the catering to different diets including vegan, gluten-free, or allergen-free foods.

Sector Performance

Food & Beverage - North America

Over the six months from September 11, 2014, to March 10, 2015, leading companies in the food and beverage sector underwent a slump in stock prices. Most companies closed at a lower price, except for ConAgra Foods Inc (NYSE: CAG) and PepsiCo Inc (NYSE: PEP). The drop in stock prices was reflected in the Dow Jones Food and Beverage Index, which rose by a minimal 1.46%, underperforming that of the S&P 500, which rose by 2.43% over the period. Decreased stock prices were attributed to low sales and weak consumer demand, despite the drop in oil prices, as consumers opted to save rather than spend.

Top gainers of the period ConAgra Foods Inc and PepsiCo Inc were the only companies that saw an increase in stock price by 4.47% and 2.88% respectively. ConAgra's share price closed at US\$33.91, up from US\$32.50, while PepsiCo closed at US\$94.43 from US\$91.65, maintaining its position in the leading companies as the company with the highest share price.

General Mills Inc (NYSE: GIS) closed at US\$51.79, down 2.71% from US\$53.27, followed by Mondelez (NASDAQ: MDLZ), which dropped 3.08% to US\$34.50 from US\$35.75, while Coca-Cola Co (NYSE: KO) dropped 3.51% to US\$79.74 from US\$86.36. The share prices of Coca-Cola Enterprises (NYSE: CCE) and Bunge Ltd (NYSE: BG) dropped by a similar amount; Coca-Cola Enterprises fell 6.53% from US\$45.93 to US\$42.80, while Bunge was down 6.58% to US\$79.94 from US\$86.36. The worst performer was Archer Daniels Midland (NYSE: ADM), whose share price dropped 10.16% to US\$45.52 from US\$50.92.

Leading Companies' Share Price Movements over the Six Months from September 11, 2014, to March 10, 2015

company Change,	Closing Price as on September 11, 2014	Closing Price as on March 10, 2015	%
Archer Daniels Midland Co 10.16,	US\$50.92	US\$45.52	-
Bunge Ltd 6.58,	US\$86.36	US\$79.74	-
Coca-Cola Co 3.51,	US\$41.95	US\$40.69	-
Coca-Cola Enterprises Inc 6.53,	US\$45.93	US\$42.80	-
ConAgra Foods Inc +4.47,	US\$32.50	US\$33.91	
General Mills Inc 2.71,	US\$53.27	US\$51.79	-
PepsiCo Inc +2.88,	US\$91.65	US\$94.43	
Mondelez International Inc 3.08,	US\$35.75	US\$34.50	-
Industry Average Rise -3.15,			
Dow Jones US F&B +1.46,	483.94	490.60	
S&P 500 +2.43,	1,997.45	2,044.16	

Sources: Dow Jones and S&P Indices

Leading Companies

In 2014, due to fluctuations in the macroeconomic environment, as well as strong competition due to the overall low prices of food commodities, most of the eight leading F&B companies tracked by Mergent reported decreases in profits and sales volumes. Most companies undertook restructuring and expansion of production facilities in order to increase efficiency and profitability.

Archer Daniels Midland Co (NYSE: ADM)

A leading agricultural processor worldwide, ADM's four major business segments consists of oilseeds, agriculture, corn and other services. Net sales decreased slightly from US\$51.97 billion in 2013 to US\$50.59 billion in 2014,

Food & Beverage - North America

while net earnings rose to US\$2.2 billion from US\$1.3 billion. The decrease in revenues is attributed mainly to lower average sales prices due to an overall decline in commodity prices as well as a decrease in sales volumes. In the second half of 2014, ADM also finalized further activities in its portfolio management including the sale of its global chocolate and cocoa businesses, as the company aims to focus on growth in segments such as sweetener and fiber in China.

Bunge Ltd (NYSE: BG)

Bunge is an agribusiness and food company whose operations span across 40 countries, and produces high quality products such as animal feed, renewable fuels and consumer foods. Net sales for the year ended December 31 2014 were US\$57.2 billion, a 6.82% decrease from US\$61.3 billion the year before. However, net income rose to US\$517 million from US\$306 million in 2013, due primarily to lower income tax expenses as a result of structural changes in the company.

Coca-Cola Co (NYSE: KO)

Established in 1892, the Coca-Cola Company has grown to a multinational beverage corporation, with a range of non-alcoholic beverages including carbonated drinks such as its signature Coke, as well as juices, energy drinks, flavored water and tea-infused drinks. Consolidated net operating revenues for 2014 were US\$46 billion, a 2% drop from US\$46.9 billion the year before, partially due to the increase in production costs. Its gross profit also declined by 3% from US\$28.4 billion in 2013 to US\$28.1 billion. Global sparkling beverage volume grew 1% in 2014, driven by growth in brands such as Coca-Cola, Sprite and Fanta.

Coca-Cola Enterprises Inc (NYSE: CCE)

Operating mainly in Western Europe, Coca-Cola Enterprises markets, bottles and distributes Coca-Cola Co Beverages. Net sales for 2014 came to a total of US\$8.3 billion, a 0.5% gain year-on-year, while net income decreased from US\$667 million to US\$663 million. Consumers' concerns of the effect of soft drinks on health impacted sales, with total volume remaining flat, although brands such as Coca-Cola Zero and energy drinks reported growth, indicating the consumer trend toward low-sugar alternatives.

ConAgra Foods Inc (NYSE: CAG)

ConAgra Foods is known for its wide variety of packaged food products and is one of the leading food companies in North America. For first half of fiscal 2015, ended November 23rd 2014, net sales reached US\$7.85 billion, a decline from US\$7.94 billion for the same period in 2013, due to an increase in costs and expenses. Net income increased to US\$500.4 million from US\$399.6 million as the company strengthened its domestic market share and reported growth in its Commercial Foods segment.

General Mills Inc (NYSE: GIS)

Net sales for multinational food manufacturer General Mills in the first six months of fiscal year 2015 dropped by 3% to US\$8.98 billion, while operating profit declined by 11% year-on-year to US\$1.54 billion, compared to the same period in fiscal year 2014. While the overall macroeconomic environment remains challenging, sales improved in the second quarter and are expected to continue improving over the remaining half of fiscal 2015. Health food products such as Fiber One cookies and Nature Valley breakfast biscuits were strong contributors of net sales in the six months to November 23 2014.

PepsiCo Inc (NYSE: PEP)

Global leading food and beverage PepsiCo reported a financial performance for 2014 that exceeded expectations, with net revenue for the year rising to US\$66.7 billion, compared to US\$66.4 billion in 2013. Cost of sales also decreased, reflecting greater production efficiency, but net income decreased from US\$6.79 billion in 2013 to US\$6.56 billion, due to increased administrative expenses and operating cost inflation.

Mondelez International Inc (NASDAQ: MDLZ)

Food & Beverage - North America

Confectionery, food and beverage conglomerate Mondelez owns well known brands such as Cadbury, Halls and Oreo, amongst others, reported a 3% decline in 2014 net revenues to US\$34.2 billion, mostly due to currency exchange conditions. Operating income was down 18.4% to US\$3.2 billion, mostly due to restructuring costs and other administrative expenses.

Mergers and Acquisitions

Despite unfavorable macroeconomic conditions, the M&A scene in 2014 remained dynamic, with much of the focus on expansion into emerging economies as well as innovation in ingredients, health food, and processed meat products.

Large multinational companies worked toward establishing their presence overseas by the acquisition of well-known local companies in order to take advantage of their domestic popularity as well as their distribution network. Kellogg (NYSE: K) expanded their hold in the Egyptian market through the acquisition of cake and biscuit maker Bisco Misr for US\$125 million in January 2015. Mondelez International finalized an agreement to acquire an 80% stake in Vietnamese snack manufacturer Kinh Do for US\$370 million, a move that will add ethnic Vietnamese confectionery products such as mooncakes, as well as other agricultural and food products to its portfolio.

As health continues to be a major factor in consumer decisions, companies continued to consolidate operations for the production of nutritious food with high quality ingredients. American cereal producer Post Holdings (NYSE: POST) added MOM Brands, a popular natural producer to its portfolio of convenient, ready-to-eat snack bars. The acquisition is expected to be completed by the third quarter of 2015, at a value of US\$1.15 billion. General Mills acquired California-based Annie's for US\$821 million in October 2014, a well-known producer of pastas, meals and snacks using natural, organic ingredients. Annie's strong market presence will be an added advantage to General Mills as it continues to extend its health and organic segment.

As disposable incomes rise along with health awareness, companies have invested more into innovation and product development. Archer Daniels Midland is continually upgrading its specialty ingredients segment, and added Specialty Commodities in November 2014 for US\$191 million. Specialty Commodities is known for its assortment of nuts, fruits and seeds, which are regarded as premium ingredients for further product manufacture.

Although organic ingredients are more expensive, consumers have shown a preference for premium, high-quality products, and Unilever (NYSE: UN) is leveraging this demand through its extension of its ice cream segment by acquiring Talenti Gelato & Sorbetto for an undisclosed amount in December 2014. Talenti is known for its artisanal methods and innovative flavors such as Oatmeal Raisin Cookie Gelato, and has established itself as a premium brand.

The M&A market is expected to remain strong throughout the first half of 2015, as companies continue to seek differentiation through consolidation and synergies as they merge to pool resources for added efficiency and productivity.

Current Environment- Canada

Sector Overview

As a major oil exporter, the decline in oil prices over the last six months hit the Canadian dollar hard, but the drop in value benefited Canada's export opportunities, although it impacted food companies through the increased expense incurred for the cost of imported ingredients.

Despite an unstable macroeconomic environment, leading companies in the F&B sector performed well, posting increases in revenue overall. Profits offset by increased administration costs, but most companies reported an increase in profits gained year-on-year.

Companies continued to carry out innovation through the consolidation of companies as well product development and market campaigns in order to cater to the demands of consumers. Dairy products and meat were areas of

Food & Beverage - North America

focus in the latter half of 2014; although global milk prices declined, the popularity of value added dairy products including yoghurt drinks, snacks such as cheese or and flavored milk continued to grow, particularly as convenient, on-the-go snacks that appeal to both children and busy parents.

While beer consumption decreased, which led lower sales volumes for beverage companies such as Molson Coors (NYSE: TAP), the beverage segment has continued to expand as the demand for fruit drinks, energy drinks and others such as liquor and spirits grew. Combinations of the segments such as ready-to-drink cocktails and spritzers are particularly popular with the young adult demographic, as reflected by the high sales of Andrew Peller's (TSE: ADW/A) skinnygrape spritzers.

Sector Performance

Canadian F&B companies turned in a stellar performance over the six months from September 11, 2014 to March 10, 2015, with an average rise in share price of 11.76%, also reflected in the 20.52% increase of the S&P/TSX Capped Consumer Staples Index (S&P/TSXCS), which far outperformed the 2.43% increase of the S&P 500. The eight leading companies as tracked by Mergent all closed stronger for the period, although the weakest performer Andrew Peller Ltd, maintained a relatively flat share price at a minimal increase of 0.13% from C\$15.07 (US\$12.09) to C\$15.09 (US\$12.75).

The strongest gainers were Cott Corp (NYSE: COT); up 25.56% from C\$7.60 (US\$6.10) to C\$9.53 (US\$7.64), Molson Coors Brewing Co, up 18.38% from C\$79.98 (US\$64.16) to C\$93.05 (US\$74.64), George Weston Ltd (TSE: WN); up 14.67% from C\$85.50 (US\$68.59) to C\$98.59 (US\$79.09), and Corby Spirit & Wine Ltd (TSE: CSW.A), up 12.92% from C\$20.45 (US\$16.40) to C\$23.43 (US\$18.80).

Lassonde Industries Inc (TSE: LAS.A) performed relatively well, with a 9.96% increase from C\$125.50 (US\$100.68) to C\$138.00 (US\$110.70), remaining the company with the highest share price in the eight leading companies. Saputo Inc (TSE: SAP) and Maple Leaf Foods (TSE: MFI) posted gains of 6.81% from C\$33.04 (US\$26.50) to C\$34.97 (US\$28.05) and 6.76% from C\$20.19(US\$16.20) to C\$21.49 (US\$17.24) respectively.

Leading Companies' Share Price Movements over the Six Months from September

11, 2014, to March 10, 2015

company	Sept 11, 2014	March 10, 2015	% Change,
George Weston Ltd	(US\$68.59)	US\$79.08)	+14.67,
Saputo Inc	(US\$26.50)	(US\$28.05)	+6.81,
Maple Leaf Foods Inc	(US\$16.20)	(US\$17.24)	+6.76,
Molson Coors Brewing Co	(US\$64.16)	(US\$74.64)	+18.38,
Cott Corp	(US\$6.10)	(US\$7.64)	+25.56,
Lassonde Industries Inc	(US\$100.68)	(US\$110.70)	+9.96,
Andrew Peller Ltd	(US\$12.10)	(US\$12.11)	+0.13,
Corby Spirit & Wine Ltd	(US\$16.40)	(US\$18.80)	+12.92,
Industry Average Rise/Fall	+11.76,		
S&P/TSX Capped Consumer Staples Index	37.09	44.70	+20.52,
S&P 500	1,997.45	2,044.16	+2.43,

Sources: Toronto Stock Exchange & S&P Indices

Leading Companies

George Weston Ltd (TSX: WN)

George Weston Ltd remains the largest food processing and distribution company in Canada, and reported that sales for 2014 increased year-on-year from C\$33.6 billion (US\$27 billion) to C\$43.9 billion (US\$35.2 billion), but net earnings dropped from C\$904 million (US\$725.2 million) to C\$134 million (US\$107.5 million), partly due to increased operating expenses, but mostly because of the charges related to the acquisition of Shoppers Drug Mart.

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Weston Foods' profitability was impacted by foreign currency exchange conditions, but changes in pricing and sales mix led to increase in sales volumes for 2014.

Saputo Inc (TSX: SAP)

Leading Canadian cheese and dairy manufacturer, Saputo Inc reported total revenues of C\$9.2 billion (US\$7.38 billion) for 2014, a 26.5% increase from US\$7.3 billion (US\$5.86 billion) the year before, while net earnings grew 10.8% from US\$481.9 million (US\$386.6 million) to US\$534 million (US\$428.4 million). The fluctuation of the Canadian dollar positively impacted revenue in the US sector, while the recovering US economy also contributed to higher revenues and sales volumes. Other market factors such as an increase in the costs of ingredients and fuels, and changes in the market pricing of milk and cheese offset profits.

Maple Leaf Foods Inc (TSX: MFI)

Maple Leaf Foods specializes in packaged meats, but also offers a wide range of other processed food products. Sales for 2014, aided by improving economic factors and the efficiency afforded by new facilities, increased to C\$3.16 billion (US\$2.53 billion) from C\$2.95 billion (US\$2.37 billion), with meat products bringing in the biggest profit. Net earnings improved from C\$512.2 million (US\$410.9 million) to C\$711.9 million (US\$571.1 million), as a result of higher demand, particularly in exports due to the weakening Canadian dollar. Maple Leaf's investment in improving production facilities has also led to greater efficiency.

Molson Coors Brewing Co (TSX: TPX)

Leading brewery and beer distributor Molson Coors had net sales of C\$4.15 billion (US\$3.33 billion) in 2014, down 1.4% on a reported basis, while net income decreased 31.9% to C\$93.2 million (US\$74.8 million). Losses were mostly attributed to lower sales volumes for beer, although Coors Light volume increased by close to 2% worldwide, while the weak Canadian dollar also affected profitability. Despite slack demand, the company invested in strengthening their portfolio through value-added product development as well as further enhancing the above premium segment.

Cott Corp (TSX: BCB)

Producer and distributor of beverages, for the fiscal year 2014 ended January 3 2015, Cott Corp revenue of US\$2.103 billion, a slight increase compared to US\$2.09 billion the year before. Operating income dropped from US\$88.2 million to US\$15.7 million, due to the impact of foreign exchange as well as expenses accumulated in restructuring the company, which doubled from US\$2 million in 2013 to US\$4.1 million in 2014. This, coupled with relatively flat sales, led to a steep drop in operating income.

Lassonde Industries Inc (TSX: LAS)

Lassonde Industries achieved sales of C\$831.6 million (US\$667.1 million) for the nine months ended September 27 2014, an increase from C\$756.7 million (US\$607 million) for the same period in 2014. Profits also rose from C\$29.3 million (US\$23.5 million) to C\$30.4 million (US\$24.4 million). Lassonde offers a diverse array of fruit and vegetable juices and drinks, and has appealed to consumers with its focus on innovative flavors and nutritious ingredients. Low demand in the fruit and vegetable juice sector has led to stiff competition, which Lassonde offsets using the strength of its private label products, which remain popular.

Andrew Peller Ltd (TSX: ADW)

Sales of Andrew Peller for the nine months ended December 31, 2014, came to a total of C\$246.9 million (US\$198.1 million), an increase from C\$231.8 million (US\$186 million) the year before, while net earnings also increased from C\$14.6 million (US\$11.7 million) to C\$15.04 million (US\$12.1 million). Sales revenues were driven by growth across the Company's trade challenges and the popularity of its new skinnygrape spritzers and Panama Jack cocktails, aimed to deliver fresh flavors as well as provide young consumers with a variety of choices of drinks.

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The company has also successfully controlled production costs through increasing productivity and efficiency, which has led greater profitability for the company.

Corby Spirit & Wine Ltd (TSX: CSW.A)

Alcohol manufacturing and distributor Corby Spirit & Wine reported total revenues for 2014 at C\$137.3 million (US\$110.1 million), a jump up from C\$132.7 million (US\$106.5 million) in 2013, although net earnings declined to C\$24.98 million (US\$20.04 million) from C\$27.01 million (US\$21.7 million). The weak Canadian dollar was beneficial in entering the US market, and Corby continued to maintain a strong domestic presence, although increase in revenue was offset by higher costs of production.

Mergers and Acquisitions

M&A activity focused on the consolidation through the acquisition of popular local brands, merging them with the resources of leading corporations in order to expand product portfolios. Companies targeted brands that had built up popularity with nutritious and healthy products, as health continues to be the main factor in consumer decisions.

Consolidation in the health bar segment included the acquisition of Le Groupe Multibar by private company Nellson Neutraceutical, both of which produce healthy, nutritious snack bars using staple ingredients such as cereal and granola, as well as chocolate and candy to add taste and variety. The merging of the two companies will introduce greater variety in product lines as well as expand its customer base. The acquisition occurred in November 2014 for an undisclosed amount. In the dairy product segment, Gay Lea Foods Co-operative, based in Ontario, Canada, acquired Hewitt's Dairy for an undisclosed amount in October 2014. The acquisition will widen the product portfolio of Gay Lea Foods, while strengthening its presence in the domestic dairy market. Hewitt's Dairy has been around for a long time and while offering dairy staples such as milk, cream and yogurt, also provides niche products such as sugar-free and low fat ice cream, and goat milk products.

The variety of baked goods available has made it popular as a convenient snack between meals or even as meal staples, and Canada Bread (TSE: CBY), the North American subsidiary of leading Mexican baking company Grupo Bimbo (BMV: BIMBOA), announced the acquisition of Saputo Inc's bakery segment, Saputo Bakery for US\$120 million in February 2015. Saputo Bakery has changed names to Vachon Bakery, and the acquisition will strengthen the presence of Canada Bread in the snacks and cakes segment, while providing it access to a wide distribution network of over 1,000 routes throughout Canada. Weston Foods, subsidiary of George Weston, acquired Starr Culinary Delights, an established maker of cakes and desserts across North America, will add to Weston Foods' bakery segment. The transaction took place in March 2015 for an undisclosed amount.

The trend in ethnic food consumption has continued to grow, and MTY Food Group (TSE: MTY), one of the top five restaurant franchisors in Canada, acquired the assets of three Asian restaurants in December 2014. The restaurants include Manchu Wok, Wasabi Grill & Noodle, and SenseAsian, purchased for a total of US\$7.9 million. Through the acquisition, MTY has broadened its portfolio in Canada while extending its presence to America, particularly with Manchu Wok, known as a leader in the ethnic food retail category. With the increased diversification of diets and popularity of ethnic variety in food, this will bolster MTY Food Group's standing throughout North America.

As diets diversify, including different needs or preferences such as the paleo diet, gluten free food, companies have further developed specialty products to accommodate consumer needs. As a further extension of their specialty ingredients segment, Garden Protein International, a Canadian-based producer of plant-based protein brand Gardein, was acquired by Pinnacle Foods (NYSE: PF) in November 2014 for C\$175 million (US\$140.4 million). Gardein caters to a niche market which seeks alternatives to meat, a traditional protein source, and Pinnacle hopes to use it as a foundation for further extending its wellness brand Birds Eye, and bring plant-based protein into the mainstream as an accepted alternative diet. Gardein products include frozen products made from plants which are marketed as substitutes for products such as chicken strips, ground beef and fish fillets.

Industry Profile - Canada

Food & Beverage - North America

Industry Size and Value

The F&B sector in Canada is one of the biggest in the country, and has a reputation of excellent quality and safety in the manufacture of its food products. As health concerns become a top consumer priority, preferences for high quality, premium food products such as organic food, has led to an overall increase in food expenditures in 2014. The consumer price index for food rose from 132.4 in 2013 to 135.5 in 2014.

Figures from Statistics Canada showed that exports of processed food and beverage products came to C\$11.7 billion (US\$9.39 billion) in 2014 an increase from C\$10.5 billion (US\$8.42 billion) in 2013, while imports were C\$13.5 billion (US\$10.8 billion) up from C\$12.04 billion (US\$9.66 billion).

Canada's Trade in Food, beverage & tobacco products

c\$ millions	2011	2012	2013	2014,
Exports	(US\$16,732.8)	(US\$16,797.1)	(US\$18,404.9)	(US\$20,768.6)
Imports	(US\$16,576.5)	(US\$17,925.7)	(US\$19,169.5)	(US\$21,047.7)
Surplus/Deficit	(US\$156.3)	(US\$1,128.6)	(US\$764.6)	(US\$-279.1)

Source: Statistics Canada

Industry Segments

Dairy Segment

The dairy sector continues to thrive, particularly with products such as cheese, butter, yoghurt and milk, all of which are used heavily throughout the food industry as ingredients in processed products. Protein shakes, Greek yoghurt, and savory dishes such as pastas all include dairy components. Canada's dairy products are also in demand overseas, and with the popularity of fusion cuisine, even Asian countries that traditionally contain very little dairy in their diet have seen a pick-up in demand. This is reflected in export figures, which came to C\$283,934 in 2014, an increase from C\$260,415 in 2013. Imports in 2013 reached C\$461,812, which increased to C\$545,686 in 2014 due to high demand domestically.

Canada's Dairy Trade Statistics (C\$ millions)

	2011	2012	2013	2014,
Exports	(US\$153,889.2)	(US\$158,877.3)	(US\$208,904.9)	(US\$227,338.7)
Imports	(US\$345,752.2)	(US\$336,137.04)	(US\$370,465.6)	(US\$437,749)
Surplus	(US\$191,863)	(US\$176,456.7)	(US\$161,560.7)	(US\$209,976.7)

Source: Statistics Canada

Trends in vegan diets has led to decline in milk consumption, particularly as consumers seek alternatives such as almond, soy and rice milk, all of which are seen as healthier options. Dairy Farmers of Canada conducted a survey of 6,800 Canadian households, which reported that many consumers were choosing not to drink milk partly due to changes in diet, but also because of the inhumane way in which animals are treated in dairy farms.

Consumer trust has become a challenge for food companies to overcome, as a company's public image including the sustainability of its practices and the source of its ingredients have become key factors in consumers' considerations. Figures from Statistics Canada showed that consumption of fluid milk dropped from 75.55 liters in 2013 to 74.14 liters, a figure that is expected to drop further. Total revenue from fluid milk sales in 2014 reached C\$6.52 billion, a slight increase from C\$6.33 billion in 2013, boosted by high milk prices in the first half of the 2014.

Alcoholic Beverages

The consumption of alcoholic beverages is strongly ingrained in Canadian culture, in relation to social drinking as well as recreational drinking. Beer sales have declined over recent years, being overtaken by the popularity of craft beers, which have gained favor for its wide range of tastes as well as the fact that most craft beers are private label companies or independent brewers, making it easier to gain consumer trust. According to the Brewers' Association,

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craft beer export volumes in 2014 grew by 35.7% to US\$99.7 million, according to the Brewers Association, with the top export partners being Canada, Sweden, the UK, Australia and South Korea. This has put pressure on established breweries such as Molson Coors and Anheuser-Busch, many of which have begun to acquire craft beer breweries in an effort to win back market share.

As breweries struggle with stiff competition, many have sought innovation in beer flavors, targeted especially towards younger consumers. Flavors on the market include those with benefits such as lower alcohol and calorie content, as well as fruity concoctions such as apple, grapefruit and strawberry, which bring a fresh twist to the traditional beer taste. Molson Coors has added products such as Molson Canadian 67 Tangerine Twist, and Molson Canadian 67, a low calorie option, and in June 2014 Mad Jack Apple Lager was launched, a non-alcoholic alternative for non-beer drinkers.

Non-Alcoholic Beverages

Non-alcoholic beverages continue to maintain a strong presence in the F&B industry, with variations such as fruit juices, flavored waters, sports drinks and soft drinks encompassing a wide range to suit different tastes and needs. In 2014, exports of water and non-alcoholic beverages decreased from C\$160.8 million to C\$117.6 million, while imports grew from C\$814.5 million to C\$937.2 million. While soft drinks have experienced a sharp drop in popularity due to its negative image as 'junk' food, beverage companies have introduced low-sugar varieties, smaller serving sizes, and a selection of other beverage products in an attempt to retain market share. Tea-infused drinks have become popular over 2014, particularly when mixed with other ingredients to create innovative flavors that also carry a touch of caffeine.

Sector Investment

Investment in Canada has focused on consolidation to bring about synergy and productivity, while also setting trade agreements in place that will facilitate trade flows.

Agropur Cooperative, the largest dairy cooperative in Canada, received a C\$470 million investment from various Quebec's institutional investors and bankers, which supports further growth and development of the cooperative. This has placed Agropur among the largest of the dairy product processors in North America, and is hoped to continue to spur growth amongst the dairy farmers and businesses in the region, particularly as the dairy industry continues to grow to fuel overseas demand. The support will also help the Canadian industry to weather losses from the volatility of milk prices and the threats of oversupply.

In June 2015 the Canada-Korea Free Trade Agreement has put into place significant reductions in tariff costs, and as seafood is among the top agrifood exports in British Columbia, the reduction of tariffs will mean greater access to a seafood-loving market at a competitive price.

Policy and Regulatory Environment

In 2014, Taiwan lifted an eleven-year ban on Canada's beef products and began imports in order to meet the growing demand in the country. However in 2015, due to an outbreak of BSE confirmed by the Canadian Food Inspection Agency, Peru, Belarus and Taiwan have imposed a temporary ban on Canadian beef product imports in order to minimize risk of exposure.

As food safety continues to be a major concern, the Canadian government announced the implementation of labeling requirements to mechanically tenderized beef in August 2014, which will include clear labels on whether meat has been mechanically tenderized, as well as instructions for the safe cooking and handling of the product. This is hoped to minimize cases of food poisoning due to improper cooking as well as further educating the general public on safe handling of food products, particularly raw meat products.

Changes to food nutrition labels have also been suggested, which will include listing ingredients, nutritions and daily values. One important issue is that of sugar content, as well as standardizing serving values to avoid confusion. This move is expected to help consumers decide on the best product for them in the myriad choices now available.

on the market, while also increasing transparency and accountability in food manufacture. This is just one step forward in that direction; with the most important being adequate policing of food companies to ensure that they comply with regulations and are being honest about the ingredients being used.

Industry Profile - US

Industry Size and Value

The F&B industry over the past few months suffered from lackluster sales and volatile food commodity prices, but with the recovery of the US economy, the outlook for 2015 is positive, particularly domestically as unemployment levels drop. According to the Bureau of Labor Statistics, unemployment rates from February 2014 to February 2015 dropped significantly in 42 states. Higher levels of income and greater awareness of health risks associated with diet has led to greater demand for high-quality, premium food products which deliver health benefits and assurance of safety, particularly in the processed food market. Food manufacturers continue to develop strategies to attract and retain customers through restructuring of their companies, international expansion, innovative products and higher efficiency.

Despite the rebound of the US dollar, exports have continued to rise, with developing economies in Asia such as China feeding demand for food products from the US. Exports of food, beverages and feeds came to a total of US\$144.2 billion in 2014, an increase from US\$136.2 billion the year before, while imports also increased to US\$125.7 billion in 2014 from US\$115.1 billion in 2013. Trade in food, feeds and beverages were the highest on record, according to the US Census Bureau. US exports of soybeans retained the highest export value in 2014, at US\$25.5 billion, while meat came in second at a value of US\$20.1 billion.

The meat market in particular is set to continue growing, as Western diet influences have led to an increase in the consumption of red meat in Asian countries. Meat products, excluding poultry, retained the highest export value in 2014 at US\$17.1 billion from US\$15.6 billion in 2013, while imports came to US\$9.12 billion, a jump up from US\$6.7 billion the previous year.

While the effects of globalization has led to stiff competition from both domestic and foreign companies, the US F&B industry continues to thrive through forging beneficial partnerships with foreign companies to aid in expansion, and continues to live up to its reputation of high quality food safety procedures while continuing to further develop advances in food technology.

Industry Segments

Dairy Processing Industry

The dairy sector has experienced a boom in the past few years due to the high demand emerging from China, particularly in the infant nutrition sector. However, in 2014, a global glut of milk led to a steep drop in prices, exacerbated by the slowing economic growth of China. According to the USDEC, the total value of dairy exports in 2014 reached a value of US\$7.1 billion, although in the second half of the year, the drop in volume of exports to China and Russia caused a slump due to milk surplus. The slump has carried over into 2015; with figures showing that exports in January 2015 dropped 23% from a year ago to 125,876 tons, while total overseas sales decreased 31% in value to US\$401.5 million.

Due to weak demand, with most regions including the biggest markets Mexico and China reporting losses in shipment value, only South Korea and South America have shown improvement, leading to decreases in dairy exports across categories. Weak prices are expected to continue throughout the first half of 2015, with milk production expected to decrease, according to a USDA Report.

Global prices continue to fluctuate, rebounding from the all-time lows of 2014, increasing by 30% to US\$3,125/ton in March 2015 compared to December 2014. US export volumes will also be affected by the strong US dollar, as opposed to the weakening currency of countries such as Europe and Canada. However the outlook remains fairly

positive, as the world economy is projected to grow 3-4% in 2015, offsetting losses from the dairy industry inventory buildup.

Due to the volatility of milk prices over the latter half of 2014, the three leading dairy exporters of the world came together to fight for a beneficial outcome for the dairy industry in the Trans-Pacific Partnership (TPP). The countries involved were the US, Australia and New Zealand. It is hoped that negotiations will lead to fair trading conditions that will expand markets for dairy farmers and processors while ensuring competitive prices for consumers.

Processed Fruits and Vegetables

Strong demand for processed fruits and vegetables including juices, preserved and frozen products led to an increase in trade flow for 2014. In 2014 export figures reached US\$5.15 billion compared to US\$5.03 billion in 2013 while imports rose to US\$8.19 billion from US\$7.95 billion. Processed fruits and vegetable products provide convenient alternatives to fresh fruits and vegetables, usually as snacks or condiments. Busy lifestyles have led to the need for snacks that contain both high nutritional quality while being easy to consume on-the-go.

With the increased focus on health in lifestyle, most food companies have incorporated fruits and vegetables into snacks, such as mixing dried fruit with chocolate, tasty snack bars with nuts and fruits, as well as flavored drinks. Fruits and vegetables also come in a wide range of tastes and textures, often acting as a natural sweetener in the manufacturing of food products.

Sugar and Confectionery

Despite worries over the effects of high sugar content in the diet, confectionery and desserts remains a big part of popular culture. Many consumers regard confectionery as 'guilty pleasures' and a sign of indulgence, but the myriad ways in which food manufacturers package and market their products make them popular not just for taste but for the associated sensory experience. While US confectionery products are popular worldwide, the strong US dollar led to a slight drop in 2014 exports, from US\$2.67 billion in 2013 to US\$2.48 billion, imports remained high at US\$5.39 billion, compared to US\$7.95 billion in 2013.

Confectionery continues to remain a big part of the food retail industry, with specialty flavors and ingredients flooding the market, particularly on days of cultural significance such as Valentine's Day, Halloween. Creative desserts also continue to pick up as food trends, such as the Nutellasagna by Brookly Bakery Robicelli's, which attracts consumers both for novelty and taste, similar to the cronut and cupcake trends preceding it.

Sector Investment

The US contains to maintain its reputation for dedication in advancing the F&B industry, with the US government devoting several grants to various institutes in order to conduct further research in food technology. Individual companies have also invested in expanding facilities for greater efficiency and production capacity, particularly overseas. As the economy continues to pick up, the US is likely to continue to see high levels of foreign investment.

Due to difficult market conditions and uncontrollable variables such as weather or crop diseases, many farmers are struggling to maintain high harvest yields. In 2014 the USDA announced funding of US\$66.5 million allocated to further developing the specialty crop industry, which is hoped to alleviate organic agriculture issues across the country. The funding is overseen by the National Institute of Food and Agriculture (NIFA), which will be given as grants through the Specialty Crop Research Initiative and the Organic Agriculture Research and Extension Initiative. Research on plant genetics that will improve crops' resistance to diseases as well as improving production yields is expected to bring forth results that will aid farmers, particularly those who have committed to producing organic food.

Companies which have invested in greater production capacity include JBS USA, leading processor of pork and beef products, will invest US\$75 million in the expansion of its beef processing complex in Hyrum, Utah, which is expected to ramp up product levels as well as efficiency in manufacturing. The expansion will create over 120 new jobs and expand the diversity of the offering of beef products.

Setting up facilities in foreign countries provides logistical advantages in distribution and in responding to the local market. Mondelez International is establishing its standing in the Middle East and African markets, with a US\$90 million biscuit plant in Bahrain. The facility is set to include four biscuit-manufacturing lines, with an overall capacity of 90,000 tons per year, and will create 300 jobs for the region. This is Mondelez's second capacity in the region, following its 2008 Kraft Cheese and Tang powdered-beverage plant, which cost more than US\$75 million. Mondelez also an investment of US\$24 million in Gebze Turkey, to expand its confectionery plant by adding a new processing and packaging line, set to begin use by the end of 2015.

In a similar move to Mondelez, PepsiCo has entered the Middle Eastern market with a new snack production plant located in Dammam, Saudi Arabia, its fifteenth facility in the Middle East. Popular products such as Lays will be manufactured in the plant, which will employ up to 300 people, and will continue to extend the reach of PepsiCo in the growing market of the Middle East. This is the second project following the launch of an innovation centre in Dubai earlier in September 2014, its first such facility in the Middle Eastern region. Investment in this centre includes facilities for the innovation and development of new flavors and products.

South-east Asia continues to grow in affluence, particularly as incomes for the middle and working classes rise, and agribusiness giant Cargill has announced forthcoming plans for a US\$1 billion investment in Indonesia over 3 to 4 years. The investment will focus primarily on the establishment of the poultry industry, one of the most popular and highly consumed types of meat in the Muslim country. Cargill already owns extensive palm oil operations in the country, spanning over 40,000 hectares, and the investment is also partly to continue to strengthen their position. Next on the roster is that of a cocoa processing plant in East Java, which will cost approximately US\$100 million.

In connection to the joint venture between ConAgra Foods' Lamb Weston and Meijer Frozen Foods, a frozen potato facility is set to be constructed in Bergen op Zoom, Netherlands, at a cost of US150 million. The expansion will increase production capacity, and will provide added efficiency to the supply and distribution of frozen potato products throughout North America, Europe, as well as opening channels to China. This, in addition to the facility recently opened in Shangdu, Inner Mongolia, is part of ConAgra's strategy of extending its international presence.

Research and Development

Stringent food safety regulations, tough competition and consumers with higher demands have led to the need for extensive investment in the R&D of food products. While innovation includes unique products and nutritious yet delicious flavors, companies are also concerned with the role of food technology in increasing crops' resilience to diseases, as well as greater purity of ingredients, and higher yield.

The high cholesterol content in cooking oil has led to a variety of alternatives such as canola oil, sunflower oil and rapeseed oil, much of which can also be used as a supplementary ingredient in food such as salads. Cargill introduced their functional food product, IngreVita EPA/DHA omega-3 oil, made from high-oleic sunflower oil, which includes the incorporation of essential EPA and DHA that help to prevent heart disease, according to the American Heart Association. This product provides an alternative ingredient for consumers who choose to consume non-GMO products and is the second in the IngreVita series, preceded by canola oil.

Policy and Regulatory Environment

The ever-changing policy and regulatory environment reflect progress in ensuring the quality and safety of food products manufactured in the US. As of now, safety in the US food industry is overseen by three bodies: the Food and Drug Administration (FDA), Food Safety Inspection Service (FSIS), and miscellaneous other agencies, and President Barack Obama has proposed that the services be melded into a single food safety agency, which is expected to bring greater effectiveness, transparency and accountability to the food manufacture industry, while also improving responses to food-borne illness outbreaks.

Out of the three, the FDA is responsible for most foods, while FSIS oversees the meat and poultry sector. If approved, the proposal will be part of the FY2016 budget. This is the second act made by Obama to further change the food industry, after implementing the Food Safety Modernization Act in 2011, for which the FDA are seeking an additional US\$110 million in funds.

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With increasing concerns over the effect of diet on health, the FDA announced the implementation of two new rules, which include calorie information to be listed on menus and menu boards in food retail establishments including chain restaurants, vending machines and any place where food is sold. Information includes calories, as well as additional nutritional information on fat, saturated fat, cholesterol, sodium, carbohydrates, protein and other types of nutrient in order to help consumers make informed decisions about the food they eat. This rule has been introduced as an addition to the 1990 Nutrition Labeling and Education Act, which did not cover nutrition labeling on restaurants and other ready-to-eat food.

Key Points

Current Environment

Canadian F&B companies achieved steady sales performances and rises in stock prices over the latter half of 2014, while US companies reported a dismal performance, with mostly flat sales figures. Consumer spending was affected by the macroeconomic environment, with both the US and Canada reacting cautiously to the effects of plummeting oil prices. September 11, 2014, to March 10, 2015, while US companies suffered an average loss of -3.15%. Both US and Canadian F&B companies invested in overseas expansion through collaborations with foreign companies as well as setting up production facilities. Merger and acquisition activity remained active in the six months as companies underwent restructuring to maximize profitability as well as consolidate key assets.

Industry Profile

A strong dollar and slowing growth in developing economies has led to a decrease in trade flow for the beginning of 2015, although the second half of 2014 continued to register increases in exports and imports. The weakening Canadian dollar has boosted competitiveness for exports and is expected to benefit the F&B industry as demand for food such as dairy and meat products grows. Exports and imports for Canada also increased due to high domestic and international demand. Investment in the F&B sector is largely focused on capturing market share in developing markets such as Egypt and Asia, while also further investigating opportunities in food technology with regards to higher efficiency and food safety.

Market Trends and Outlook

Ethnic influences continue to find their way into the mainstream, enabling innovative twists to traditional food products while introducing new textures and flavors. Genetically modified food products remain controversial among consumers, and large companies such as Hershey's have chosen to use non-genetically modified ingredients in order to build up consumer confidence. Niche markets such as gluten-free and vegan diets have become more widespread in recent years, and are often associated with better health.

The source of ingredients has also become a major concern for consumers, with many choosing to buy locally produced food or organic food, and as such companies have begun to develop transparency and accountability practices in order to gain consumer confidence.

Key References

Key References

Global

International Food Information Council (IFIC)

The IFIC is a non-profit organization with established partnerships with a wide range of professional organizations and academic institutions to develop and disseminate science-based information to the public.

<http://www.ific.org>

International Dairy Foods Association (IDFA)

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The IDFA is an industry body representing the US and international dairy foods industry and has become a leading player in the formation of domestic and international dairy policies.

<http://www.idfa.org>

International Bottled Water Association (IBWA)

The IBWA is an industry body representing the US bottled water industry and has supported the US Food and Drug Administration (FDA) and state regulators/legislators in the development of strict regulations that help guarantee bottled water quality.

<http://www.bottledwater.org>

United States

US Department of Commerce

The DoC is a government department that provides key information and statistical analysis of the US economy and industries.

<http://www.commerce.gov/>

US Census Bureau

The bureau is a government agency that represents the official source of the US demographic and economic statistics.

<http://www.census.gov/>

Bureau of Labor Statistics (BLS)

The BLS is an independent government agency that collects, processes, analyzes, and disseminates essential statistical data to the public, the US Congress, other federal agencies, state and local governments, business, and labor.

<http://www.stats.bls.gov/>

US Food and Drug Administration (FDA)

The FDA is government agency responsible for protecting public health and approving food, drugs and other health related products for public use.

<http://www.fda.gov/>

US Department of Agriculture (USDA)

The USDA is an independent government agency that provides expertise, resources and information for the agricultural production sector in the US.

<http://www.usda.gov/>

National Confectioners Association (NCA)

The NCA is an industry association that represents US confectionery manufacturers as well as international manufacturers and suppliers of confectionery products to the industry.

<http://www.candyusa.org/>

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Wine Institute

The institute is a public policy and advocacy association for Californian wineries and is funded by members to provide industry information and resources for the wine industry.

<http://www.wineinstitute.org/>

US Beer Institute

The Beer Institute is the official trade association for the American brewing industry and is funded by its members, including national, regional, local and international brewers as well as suppliers of brewing goods, services and agricultural products.

<http://www.beerinstitute.org/>

Canada

Statistics Canada

A national government agency that provides official Canadian social and economic statistics and products.

<http://www.statcan.ca/>

Department of Agriculture and Agri-Food Canada (AAFC)

The AAFC provides information, technology, research and policies regarding the food system and agricultural production in Canada.

<http://www.agr.gc.ca/>

Canadian Food Inspection Agency (CFIA)

The CFIA is the government agency that enforces food safety and nutritional quality standards and carries out inspection programs that are related to foods, plants and animals.

<http://inspection.gc.ca/>

Canadian Dairy Commission (CDC)

Funded by dairy producers, the CDC is a non-profit organization that coordinates the implementation of Canada's federal dairy policy and promotes the development and maintenance of a healthy and viable dairy industry.

<http://www.cdc.ca/>

Canadian Cattlemen's Association (CCA)

The CCA is a non-profit organization representing the interests of 90,000 beef producers in Canada.

<http://www.cattle.ca/>

Brewers Association of Canada

The Brewers Association of Canada is a non-profit organization that represents brewing companies operating in Canada.

<http://www.brewers.ca/>

Market Trends & Outlook US

Healthy and Trendy Ingredients

Globalization has led to the diversification of consumer diets to include ethnic influences, such as the growing popularity of sriracha sauce, a spicy condiment that has catapulted into the mainstream over recent years, with fast food chain PizzaRev adding a sriracha sausage pizza to its product lineup, and Heinz adding a Sriracha Ketchup to its product portfolio in February 2015.

With the wide variety of products available on the market now, companies have sought product differentiation through using unique combinations of ingredients. These include ?superfoods? such as quinoa, chia seeds, kale, goji berries, Greek yoghurt and dark chocolate among others, all of which boast high quantities of nutrients such as protein and minerals, while also being relatively unprocessed. With the popularity of quinoa, other ancient grains such as amaranth are poised to become the next trendy food. These have been incorporated into snacks such as energy drinks, crackers, and chocolates. For example, Mars Chocolate North America launched 'Dove Fruit' as its new chocolate product, a combination of dark chocolate and a selection of fruits high in antioxidant properties, including cherries, cranberries and blueberries.

Kraft (NASDAQ: KRFT) opted to discontinue the use of high fructose corn syrup in its products, an ingredient that is high in sugar content. In its stead, Kraft added a selection of distinctive new flavors to its Barbeque Sauce product line, including tomatoes, sweet molasses, cider vinegar and cane sugar, natural ingredients that are rich in nutritional content and bring both texture and sweetness to the final product.

Hershey's (NYSE: HSY) is following the health trend with their planned launch of Brookside Dark Chocolate Fruit & Nut bars, which are also part of its new transparency initiative, which states Hershey's intention of using locally sourced, unprocessed ingredients in the manufacturing process, while informing consumers of the content of their products. Such ingredients include roasted California almonds, locally produced fresh milk, cocoa beans and sugar.

Nestle USA (NESN) has also announced its intention to phase out the use of artificial flavors and food coloring from its chocolate candy product range by the end of 2015. This was a decision geared towards consumer preferences for food products that are made from unprocessed ingredients, which Nestle intends to replace artificial colorings and flavors in its products. This will be made obvious by labeling on the products concerned, and is a response to Nielsen's 2014 Global Health & Wellness Survey, which reported that over 60% of the American population prefers food without artificial components.

As specialty diets such as gluten free grow ever more widespread, the choices in food products have also continued to expand, with Snyder's-Lance (NYSE: LNCE) launching its new range of gluten-free snacks that deliver both on taste and nutrition, including products such as Snack Factory **Pretzel Crisps** and Peanut Butter and Cheddar Cheese Sandwich Crackers. These products also do not contain genetically modified ingredients, which Hershey echoed in its decision not to use genetically modified ingredients such as sugar beet or soya lecithin in this products.

Catering to Varying Lifestyles

Health has become a holistic pursuit, pursued not only in diet but also in lifestyle and environment, and as a result, consumers are demanding higher quality products that also focus on the consumer experience, including transparency and accountability. Due to various reasons, many different diets have been adopted by people across North America, including gluten-free, paleo, vegan, as well as consumers who suffer from various allergens, include nut allergies and lactose intolerance. As a result these micro market segments have led to the development of a range of specialized food products that cater to specific consumer demographics. Snyder-Lance launched a range of gluten-free snacks, including products such as Snack Factory **Pretzel Crisps** and Peanut Butter and Cheddar Cheese Sandwich Crackers.

As lifestyles continue to become increasingly packed, and the traditional family structure begins to change, packaging has become a priority in consumer decisions. Companies have begun to produce packaging that caters to different-sized households, including ready-made meals and snacks. Packaging has also become a 'nudge' used by companies in order to help consumers make healthier decisions, particularly when it comes to junk food

Food & Beverage - North America

consumption. Coca-Cola managed to boost sales of its soft drinks by creating smaller servings, which offset the high sugar content of the product that make consumers hesitate to consume it. Unilever Ice Cream also launched 16 new treats for 2015 that builds onto established brands such as Magnum and Klondike, with packaging as multipacks of varying numbers, so consumers can buy according to their needs.

Diet is directly linked to health, and image-conscious consumers often consider the benefits of food products on losing weight or in maintaining a certain body type. Protein has grown in demand due to its benefits in weight management. It is seen as a food staple while also being included in processed products such as protein shakes and bars. While the most common protein source is from meat, there has been an upsurge in the plant-based protein market, with the global market worth approximately US\$23 billion in 2013, and is expected to grow to US\$31 billion by 2018, according to research company Datamonitor. A survey from the International Food Information Council (IFIC) reported that 63% of Americans believe that a high protein diet will aid in helping them to lose weight, while 78% believed that protein-containing food is an essential part of a good diet.

High Demand for Natural Products

Genetically modified foods have become more widespread in use because of the convenience that it brings, but as a relatively new technology, consumers are wary of possible side effects that have yet to be discovered. However, the US Department of Agriculture (USDA) is encouraging further research and development in this market, and recently approved the sale and consumption of six types of genetically altered potatoes by private agribusiness J.R. Simplot, one of the largest food companies in the country, which was shown to deliver greater health and sustainability benefits. However, large corporations have chosen to acquiesce to consumer sentiment by refusing to use genetically modified ingredients in their products. For example, Hershey announced that its products do not include commonly used genetically modified crops such as sugar beet or soya lecithin.

While the demand for locally sourced food is increasing, farmers still suffer from uncontrollable variables such as weather conditions affecting crops. In order to encourage greater productivity, the USDA announced US\$96.8 million in grants for funding projects for specialty crop producers, local food produces, and improvements in school dining choices. This decision is hoped to increase market opportunities for rural businesses, while helping to improve nutrition nationwide, as many families in rural America do not have the means or the awareness for a healthy diet.

Market Outlook

As the US dollar continues to remain strong and the economy growth outlook remains positive, the F&B industry is likely to benefit from higher disposable incomes domestically contributing to greater buying power. Imports of food products, particularly ingredients needed for processed food products will also be cheaper due to currency exchange rates, which will widen profit margins. However, exports of food products may be adversely affected due to decreased affordability, as well as the slowing of powerhouse economies, particularly China.

As consumers become more discerning in their product choices, companies will be under pressure to invest in further innovation, while also adhering to strict safety standards and regulations, in particular pertaining to manufacturing facilities, food labeling and sourcing of ingredients. In March 2015 McDonald's announced its decision to use only chicken that had not been treated with antibiotics as well as milk from cows that are free from growth hormone administration, decisions which will narrow down its pool of supply.

Greater focus will continue to be put on health benefits for food products, including the use of organic ingredients, whole food ingredients such as grains and fruit instead of highly processed food, which will lead to a product which is both nutritionally balanced and tastes good. Additionally, with many consumers choosing not to consume beverages or food with high sugar and fat content, greater research is being put into alternatives for these ingredients. Research in specialty crops is being encouraged by the USDA to prevent adverse affects of bad weather.

Mergers and acquisitions are expected to remain highly active as established companies seek to consolidate product segments and create synergies in order to overcome the stiff competition in a highly saturated global

Food & Beverage - North America

market, particularly as large overseas markets become increasingly self-sufficient for products such as meat, dairy and snack foods. Corporations seek to capture market share through acquisitions of smaller, independent companies, while merging with larger corporations in order to further establish their position in the market, particularly in international expansion.

Market Trends & Outlook Canada

Flavor and Texture are Top Consumer Considerations

As the developing economies of Asia, Africa and the Middle East grow more powerful, their buying power has increased due to a booming middle class and high disposable incomes. As a result, North America has entered the market through expansion into international countries and collaborations with foreign companies. The increased flow of trade has led to osmosis between countries, with the availability of different cuisines and food increasing. This has led to a more discerning consumer palate, with greater demands on textures and flavors.

Companies have moved away from traditional flavors and added contemporary ingredients to create a twist. These twists often incorporate organic, healthy ingredients or influences from ethnic food, such as the Thai Chicken soup launched by Canada-based Happy Planet in October 2014. Happy Planet produces fresh soup that has been well received by the market, and boasts healthy choices such as gluten-free and all-natural ingredients, both of which appeal to consumers concerned about overly processed food.

The search for distinctive contemporary flavors has led to a variety of combinations that often clash, with one of the most popular being that of mixing and matching savory with various other flavors such as sweet or sour. Skinnygirl collaborated with ConAgra's Orville Redenbacher to launch a Microwave Popcorn range, focusing on its health benefits such as having no transfat content and being made from gluten-free ingredients. Its two staple flavors are that of Lime & Salt and Butter & Sea Salt.

Fermented foods such as kimchi, sauerkraut and tempeh, have gained popularity as a result of ethnic influences to the diet. They are high in nutritional content, particularly in antioxidants, and are mostly ready-to-eat, which make them convenient yet healthy accompaniments to any meal. Fermented foods aid digestion and are also relatively easy to prepare at home, which appeal to consumers who distrust food companies' safety practices. They are typically tangy in taste and provide a rich, complex texture.

Advances in Food Technology

Protein has risen to the spotlight in recent years both as a food staple and as an ingredient used in the manufacture of food products. Companies have invested in research to investigate various sources of protein and ways of delivery, and among these, hydrolyzed proteins are used widely in the manufacture of processed foods such as snacks and beverages. Private cooperative Agropur's Biozate product line released its newest hydrolyzed protein product, claiming up to 90% purity. These proteins are highly digestible and lack the bitter flavor often associated with other proteins produced in laboratories. Benefits include prolonged shelf life and better taste and texture when used.

Development of food technology continues to be a top priority for the Canadian government, focusing on greater efficiency in manufacturing processes, as well as safety and adequate regulatory controls. In the World Ranking Food Safety and Performance 2014 report, Canada ranked first out of 17 OECD countries due to its commitment toward informative labeling and transparency in company practices. In order to boost greater progress in the sector, the Saskatchewan Government in Canada announced a C\$13 million (US\$10.4 million) investment for the Saskatchewan Food Industry Development Centre to build a new facility. The new facility provides researchers with facilities such as specialized laboratory services and extrusion technology, which is expected to support the expansion of the food ingredient processing sector and enable the production of high-quality food products.

Engaging Consumers Through Marketing

Food & Beverage - North America

The term ?millenials? refers loosely to people aged between 18-36, and the priorities and needs of this demographic differs greatly from older consumers. This has been a factor which companies take into account when developing and marketing their products. As lifestyles and social practices change, the variety of households and lifestyles has become broader, with young millenials often choosing to marry later. This has resulted in a demographic with higher disposable income because of fewer commitments, which has been linked to the importance of luxury and innovative elements in their lifestyle.

As a result, millenials tend to respond well to premium products that deliver sensory stimulation in its packaging and marketing, with an emphasis on marketing through social media platforms such as Instagram or Twitter, as well as unique flavors. Canada-based frozen yoghurt producer Yogen Fruz introduced three yogurt flavors to its portfolio in 2014: Mojito Sorbet, Strawberry Daiquiri and Pina Colada. These products are tailored to be low-calorie while also appealing in particular to young female consumers. Media marketing has also taken a new approach in recent years, particularly with consumer confidence in large corporations wavering due to food scandals.

McDonald's (NYSE: MCD) is one of those that suffer from claims that the food it produces is overly processed and unhealthy. In answer, McDonald's Canada launched a campaign in 2012 called 'Our Food. Your Questions', which encouraged consumers to ask anything about food offered at McDonald's. The campaign was received well by the public, with the Canadian market for McDonald's ranking second out of its ten biggest markets. In 2015, a follow-up campaign, 'Welcome to McDonald's,' was launched, focusing on the people who work at McDonald's or eat there. Footage for the campaign was obtained from across the country, with a crew interview over 450 people, including customers, staff and suppliers. This emotional approach is an attempt to overturn the negative public image fast food chains have suffered from in recent years in regards to the quality of its food.

Market Outlook

A weakening Canadian dollar will benefit food exports, but may put pressure on profit margins due to increased costs for imported ingredients. However Canada's F&B industry remains positive, which could lead to increased foreign investment interests.

Consumers continue to focus on health and lifestyle, with a strong emphasis on natural ingredients as distrust of large corporations continues to grow, independent companies may attract greater interest. Rather than the expensive superfoods on trend, as acai berries over the past few years, consumers are turning to local products such as Saskatoon berries, while craft beers continue to grow in popularity for their distinctive flavors.

M&A activity is expected to remain strong as companies undergo restructuring to raise profitability, including the divestiture of non-profitable business segments in order to focus on further developing businesses with high sales or potential for growth. Companies will also invest in expanding existing product lines with innovation in packaging and ingredients to appeal to changing consumer tastes, particularly with processed food and soft drinks, which in recent years have declined in popularity due to its high sugar content. Product positioning through media campaigns will also be an important facet of food companies' marketing.

Currency Conversion Table

Currency exchange rates as of April 3, 2015

currency unit	US\$ per Unit	Units per US\$
US Dollar (US\$)	1	1,
Canadian Dollar (C\$)	0.8022	1.2465,

Source: Federal Reserve Bank of New York

Scope of this report

The Scope of This Report

Food & Beverage - North America

This report looks at the food and beverage industries in the United States and Canada. The report aims to give a general picture of the current environment, profile the industry and discuss market trends using available data and an examination of key public companies. Key financial results for leading companies in each country are presented in the comparative data tables on the proceeding pages.

Research analysts draw on a range of credible industry and company data sources as well as news and information services to research and analyze the current trading environment, industry landscape and market trends and outlook for a particular sector. Primary sources are used, unless otherwise indicated, and include company data, e.g. annual reports and company financial results; macroeconomic and trade data; data and information from global and country regulatory, industry and trade bodies; government data; and reports from industry organizations and private research organizations.

Industries covered by the industry reports are defined by standard industry classification systems and leading companies are identified on this basis. The following SIC codes are relevant to the industry: 2013 (Sausages and Other Prepared Meats); 2015 (Poultry Slaughtering and Processing); 2022 (Natural, Processed, and Imitation Cheese); 2023 (Dry, Condensed, and Evaporated Dairy Products); 2024 (Ice Cream and Frozen Deserts); 2026 (Fluid Milk); 2033 (Canned Fruits, Vegetables, Preserves, Jams and Jellies); 2034 (Dried and Dehydrated Fruits, Vegetables, and Soup Mixes); 2037 (Frozen Fruits, Fruit Juices and Vegetables); 2043 (Cereal Breakfast Foods); 2051 (Bread and Other Bakery Products, Except Cookies and Crackers); 2052 (Cookies and Crackers); 2064 (Candy and Other Confectionary Products); 2082 (Malt Beverages); 2084 (Wines, Brandy and Brandy Spirits); 2086 (Bottled and Canned Soft Drinks and Carbonated Waters).

Notes

Report Number 1443;

PUBLISHER: Mergent, Inc.

Load-Date: June 15, 2015

End of Document

6

Some on-the-go snacks

Iowa State Daily (Ames)

April 30, 2015 Thursday

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Section: DCT

Length: 297 words

Byline: Shelby Kramer

Body

Some granola bars are loaded with sugar, often with just as much as your average candy bar. Plus, some the processed ingredients in certain granola bars are just awful, so choose wisely. One generally trusted brand is Kasha 's TLC Chewy and Crunchy Granola Bars. They contain basic ingredients and contain a hefty 5 grams of fiber a piece.

Smoothies

Yeah, it's a drink, but it's still filling. Throw some fresh or frozen fruit, yogurt, milk or whatever else in your blender and away you go. You can also put in some ground flax seed to add some extra punch to your antioxidant-rich smoothie. Flax is a great source of fiber.

Fruits and berries

This is an obvious choice that requires little to no explanation ... so there's no explanation. Just eat fruits and berries.

Almonds

They're just the perfect snack. They're portable, clean to eat, filled with protein and some studies have shown they can help prevent prevalent diseases, like diabetes, heart disease, etc. Keep in moderation, though, because these little suckers are easy to overeat.

Hummus

Hummus is a sort of dip made from chickpeas, so it can be difficult to eat on the go. Good thing is that Sabra makes single-serve, to-go hummus with **pretzel crisps**. It's more of a chore to eat, but it's a great source of fiber, folate, iron, etc.

Cheese

Mini cheese snacks are great, but they do require refrigeration, which can be a pain. Mini Babble cheeses are the little wax-wrapped deals at the store, and string cheese can be found anywhere, even at local convenience stores. Pop some cheese with another nutritional snack for a good pick-me-up hunger-fighter during the day.

Hard-boiled eggs

These also have to stay refrigerated, plus they can be a pain to prepare. Other than that, they're an easy-to-eat and healthy option.

Some on-the-go snacks

Load-Date: April 30, 2015

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Court Dismisses Injunctive Relief Claim Allows Others to Proceed

PracticeView Database

April 29, 2015 Wednesday

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Length: 135 words

Body

Seidman v. Snack Factory LLC, No. 14cv62547 (S.D. Fla.): In this putative class action alleging violations of Floridas DUTPA, the Magnuson-Moss Warranty Act, negligent misrepresentation, breach of express warranty and unjust enrichment, claiming Defendant falsely labels its **Pretzel Crisps** as all natural when they contain synthetic or artificial ingredients such as maltodextrin, soybean oil, dextrose and caramel color, the Court granted in part and denied in part Defendants motion to dismiss. The Court found that Plaintiff is not entitled to injunctive relief because he does not allege he will ever purchase the products at issue again, dismissing the claim with prejudice. The Court allowed the remaining claims to proceed. (Source: Perkins Coie)

<http://practiceview.muzeview.com/links/index.php?id=5673569>

Load-Date: May 1, 2015

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A clear-eyed look at marijuana legalization

Marin Independent Journal (California)

April 26, 2015 Sunday

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Section: FEATURES

Length: 995 words

Byline: By Nicole Brodeur

Body

There's a great scene in Bruce Barcott's new book, "Weed the People: The Future of Legal Marijuana in America," in which after months of researching the issue with a smart and sober eye, the author walks to the side of an abandoned Denny's in Denver and fires up a joint.

After it "smolders down to a nub," he returns to his room at the Quality Inn and opens his laptop to chronicle what happens.

"What would be the most beautiful type font?" is how Barcott begins a stream-of-consciousness riff worthy of Thelonious Monk, involving **pretzel crisps** and sexy curtains.

"This is far past high. This is stoned. And it is quite pleasurable," he typed.

No wonder it's the Barcott kids' favorite section of the book. The geeky dad with all the answers uncoils into a mass of random thoughts before falling asleep with his clothes on.

In "Weed the People," Barcott serves as the self-described "canary in the coal mine" of the cannabis crusade. He had no skin in the game when he started two years ago. Just a journalist's curiosity (he is a contributing editor at Outside and has written for the New York Times Magazine and National Geographic), an investigative reporter's skill and an ability to put history, culture and economics together in an easy, conversational style.

"Part of the challenge was figuring out my own preconceptions," he said recently.

Barcott - who lives on Bainbridge Island with his wife, the writer Claire Dederer and their two kids - grew up a child of the '70s, when marijuana was for hippies. He was in high school when Nancy Reagan was urging everyone to Just Say No.

'Square' beginnings

"I was the square," Barcott said recently of his high school days. "I was arriving late and leaving early. Pretty straight. I was having a beer and that's about it."

He saw marijuana as "a bit of a trap." He didn't want his future derailed because he got caught with the stuff.

That changed in college, when he found that marijuana "was not an unpleasant experience."

He smoked a lot of it, but his grades started to suffer and he stopped.

A clear-eyed look at marijuana legalization

Fast forward to a dinner party a few years ago, when the topic at the table was Initiative 502 - the measure to legalize marijuana sales in Washington state. Barcott planned to vote against it. He didn't want his kids to have such easy access to pot.

When a friend made an impassioned and constructive argument in favor of legalization (your kids can get pot at school, thousands in jail for minor offenses), Barcott found himself sitting on the proverbial fence.

It seemed the perfect place from which to start a book, especially after Barcott scanned store shelves and saw only books written by marijuana advocates or anti-drug people. Some were clinical, others legalistic.

'Nothing fun to read'

"There was nothing current or fun to read," he said. "And I felt like there was this huge space to experience and observe."

This approach was exactly the one he took when writing 2007's "The Measure of a Mountain," about Mount Rainier: "I told people that I am not a mountain climber, I am not Ed Viesturs. I am just a geeky guy obsessed with Mount Rainier right now."

This time, that guy was obsessed with marijuana legalization, and took readers along for the lesson.

He did research and found that every year between 2005 and 2010, around 800,000 Americans were arrested on marijuana charges, most for small-time possession.

He started going to Denver about once a month. He sat in boardrooms where Wall Street and Silicon Valley investors were seeding, ahem, marijuana enterprises. He toured giant grow operations. He researched the history of marijuana, spoke with patients and artists whose lives have been sustained by cannabis. He attended festivals and rallies, got his own medical-marijuana card.

And when the votes were counted, he stood in line to make a pot purchase on the first day of legal sales in Colorado - a scene with more tension than a John Le Carre novel. But funnier.

Embrace versus allow

Barcott believes that Colorado "embraced" the legalization of marijuana, while Washington state "allowed" it.

"Colorado had a certain amount of pride about its system," he said. "That they passed their law over the objections of the powers-that-be, and Washington did it by collaborating with the powers-that-be."

Colorado - with the governor's approval - set up a regulated medical-marijuana system and used that as the foundation for its retail applications and sales, which started six months before those in Washington state.

Marijuana » Page 4

Washington had the chance to regulate medical marijuana in 2009, but then-Gov. Chris Gregoire wouldn't sign the legislation. So when pot was legalized, "We left it up to the Liquor Control Board and then the good intentions of a lottery system," Barcott said, adding that some who received licenses couldn't find money or approved locations to follow through.

"We set up a system that was hobbled at the start," Barcott said.

And now?

"I think we're doing OK," he said. "I don't think we're doing great and I don't think we're doing a terrible job. The system was set up to be slow and overly careful."

With all this knowledge, has Barcott invested in the marijuana industry?

A clear-eyed look at marijuana legalization

Nothing beyond a vape, he reported.

"But if I had the money, I would invest in ancillary businesses. Packing companies, security and video systems. Just plain, old slip-and-fall business insurance."

In the end, what Barcott feared the most - his kids having access to marijuana - has been turned on its head. Lucy, 16, and Willie, 13, are well-versed and thoughtful.

"Lucy loves the cultural context of it all, and Willie is much more of a philosopher," he said. "He loves to get into the ethics and morals of things."

But what about smoking the stuff?

"I am advising against the use of marijuana," Barcott said. "But I am saying that and saying, 'Here's why, here's what I found, here are the top three reasons why you shouldn't do it now. And if you're going to do it, wait until your early 20s.'"

Marijuana

From Page 2

Load-Date: April 26, 2015

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Barcott takes clear-eyed look at marijuana legalization

Knoxville News-Sentinel (Tennessee)

April 26, 2015 Sunday, Knoxville Edition

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Section: FEATURES; Pg. 6E

Length: 735 words

Byline: Nicole Brodeur The Seattle Times (TNS)

Body

There's a great scene in Bruce Barcott's new book, "Weed the People: The Future of Legal Marijuana in America," in which, after months of researching the issue with a smart and sober eye, the author walks to the side of an abandoned Denny's in Denver and fires up a joint.

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Barcott grew up a child of the '70s, when marijuana was for hippies.

"I was the square," Barcott said recently of his high school days. "I was arriving late and leaving early. Pretty straight. I was having a beer and that's about it."

He saw marijuana as "a bit of a trap." He didn't want his future derailed because he got caught with the stuff.

That changed in college. He smoked a lot of it, but his grades started to suffer and he stopped.

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Load-Date: April 26, 2015

Barcott takes clear-eyed look at marijuana legalization

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A clear-eyed look at marijuana legalization

The Lawton Constitution (Oklahoma)

April 25, 2015 Saturday

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Section: OPINION; Pg. 4A

Length: 927 words

Byline: NICOLE BRODEUR

Body

There's a great scene in Bruce Barcott's new book, "Weed the People: The Future of Legal Marijuana in America," in which after months of researching the issue with a smart and sober eye, the author walks to the side of an abandoned Denny's in Denver and fires up a joint.

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"I think we're doing OK," he said. "I don't think we're doing great and I don't think we're doing a terrible job. The system was set up to be slow and overly careful."

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In the end, what Barcott feared the most - his kidshaving access to marijuana - has been turned on its head. Lucy, 16, and Willie, 13, are well-versed and thoughtful.

"Lucy loves the cultural context of it all, and Willie is much more of a philosopher," he said. "He loves to get into the ethics and morals of things."

But what about smoking the stuff?

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"I am advising against the use of marijuana," Barcott said. "But I am saying that and saying, 'Here's why, here's what I found, here are the top three reasons why you shouldn't do it now. And if you're going to do it, wait until your early 20s.'"

Nicole Brodeur wrote this review for the Seattle Times.

Load-Date: April 26, 2015

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Level up everyday adventures with Pretzel Crisps

InPR

April 22, 2015 Wednesday 12:09 PM CET

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U2C Communications

Length: 166 words

Body

Take activities with friends to another level with the savory flavors and delightful crunch of Jack 'n Jill **Pretzel Crisps**.

This new snack from Universal Robina Corporation (URC) puts a spin on the all-time favorite pretzel by making it lighter and crispier. **Pretzel Crisps** comes in two new and tasty flavors: Honey Mustard and Cheese 'n Garlic.

Pretzel Crisps is an ideal snack for life's adventures. Packed in re-sealable bags, this savory snack can be enjoyed anytime, anywhere. For only P 15 (SRP), there's surely more room for fun, adventure and even more **Pretzel Crisps**.

Pretzel Crisps is available in leading supermarkets and groceries nationwide.

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Load-Date: April 22, 2015

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Food Notes

Charlotte Observer (North Carolina)

April 14, 2015 Tuesday

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The Charlotte Observer

Found on Charlotte.com

Section: food_drink

Length: 315 words

Byline: The Charlotte Observer

Body

Want a breakfast cracker?

Instead of Lance in your pants, you may need pockets in your pajamas. The Charlotte-based snack company, now called Snyder's-Lance after its merger with Snyder's of Hanover, is releasing a new line of filled crackers with a breakfast aim. Lance Quick Starts are whole-grain "breakfast biscuit sandwiches," like their sandwich crackers but filled with morning-centric blueberry, maple and cinnamon fillings instead of the familiar cheese or peanut butter. A five-pack of six-biscuit packets is \$2.99.

Also new from Lance: Gluten-free versions of the bite-size peanut butter and cheese sandwich crackers and Snack Factory mini **pretzel-crisps**. The company says the crackers are the first gluten-free snack crackers available.

Get baking for Matthews contest

The Matthews Community Farmers' Market returns to its summer hours of 8 a.m.-noon on Saturday, followed by the annual baking contest April 25. This year's category: Healthy Yeast or Sourdough Bread. There's no registration or fee to enter. Just arrive by 9 a.m. with your entry, including contact information and the recipe. Details: .

Vote for your favorite beer

Battle of the Brews returns 3-6 p.m. Saturday at the South End Food Truck Lot, 100 W. Park Ave. Organizer Mark Miller expects 10 breweries, eight food trucks, exhibitors from bottle shops and pour houses and live music. It is a battle, so you get a 5-ounce tasting glass and 3 bottle caps that will let you vote for your favorite beer. Tickets are \$40 at or \$50 at the gate.

Say cheese in the mountains

The WNC Cheese Trail, which promotes N.C. cheesemakers, will hold its first Carolina Mountain Cheese Fest, noon-4 p.m. April 26 at Highland Brewing Co., 12 Old Charlotte Highway, Asheville. Expect a grilled-cheese cook-off, milking and cheese demonstrations, panel discussions and 19 cheesemakers. Tickets are \$12 in advance at or \$15 at the door.

Load-Date: April 14, 2015

Food Notes

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a 'quite pleasurable' read on legal weed

The Seattle Times

April 12, 2015 Sunday

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Section: ROP ZONE; Pg. H1

Length: 1026 words

Byline: Nicole Brodeur, Seattle Times columnist

Body

There's a great scene in Bruce Barcott's new book, "Weed the People: The Future of Legal Marijuana in America," in which after months of researching the issue with a smart and sober eye, the author walks to the side of an abandoned Denny's in Denver and fires up a joint.

After it "smolders down to a nub," he returns to his room at the Quality Inn and opens his laptop to chronicle what happens.

"What would be the most beautiful type font?" is how Barcott begins a stream-of-consciousness riff worthy of Thelonious Monk, involving **pretzel crisps** and sexy curtains.

"This is far past high. This is stoned. And it is quite pleasurable," he typed.

No wonder it's the Barcott kids' favorite section of the book. The geeky dad with all the answers uncoils into a mass of random thoughts before falling asleep with his clothes on.

"Weed the People" will bring Barcott to The Elliott Bay Book Company on April 15 and Seattle's Town Hall on April 21, when he will share the stage with Christian Hageseth, founder of the Denver-based Green Man Cannabis Ranch & Amphitheater, "the world's first weedery" - whatever that is.

In the book, Barcott serves as the self-described "canary in the coal mine" of the cannabis crusade. He had no skin in the game when he started two years ago. Just a journalist's curiosity (he is a contributing editor at Outside and has written for The New York Times Magazine and National Geographic), an investigative reporter's skill and an ability to put history, culture and economics together in an easy, conversational style.

"Part of the challenge was figuring out my own preconceptions," he said recently.

Barcott - who lives on Bainbridge Island with his wife, the writer Claire Dederer and their two kids - grew up a child of the '70s, when marijuana was for hippies. He was in high school when Nancy Reagan was urging everyone to Just Say No.

"I was the square," Barcott said recently of his high-school days. "I was arriving late and leaving early. Pretty straight. I was having a beer and that's about it."

He saw marijuana as "a bit of a trap." He didn't want his future derailed because he got caught with the stuff.

That changed in college, when he found that marijuana "was not an unpleasant experience."

He smoked a lot of it, but his grades started to suffer and he stopped.

a 'quite pleasurable' read on legal weed

Fast forward to a dinner party a few years ago, when the topic at the table was Initiative 502 - the measure to legalize marijuana sales in Washington state. Barcott planned to vote against it. He didn't want his kids to have such easy access to pot.

When a friend made an impassioned and constructive argument in favor of legalization (your kids can get pot at school, thousands in jail for minor offenses), Barcott found himself sitting on the proverbial fence.

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Colorado - with the governor's approval - set up a regulated medical-marijuana system and used that as the foundation for its retail applications and sales, which started six months before those in Washington state.

Washington had the chance to regulate medical marijuana in 2009, but then-Gov. Chris Gregoire wouldn't sign the legislation. So when pot was legalized, "We left it up to the Liquor Control Board and then the good intentions of a lottery system," Barcott said, adding that some who received licenses couldn't find money or approved locations to follow through.

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Load-Date: April 15, 2015

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Press Release: Snyder's-Lance, Inc. to Release First Quarter 2015 Results on Friday, May 8, Before Market Opens. Will Host Conference Call and Webcast at 9:00 am Eastern on Friday, May 8.

Dow Jones Institutional News

April 10, 2015 Friday 3:00 PM GMT

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Length: 500 words

Body

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PR Newswire

CHARLOTTE, N.C., April 10, 2015

CHARLOTTE, N.C., April 10, 2015 /PRNewswire/ -- Snyder's-Lance, Inc. (Nasdaq-GS: LNCE) announced today that it intends to release its first quarter 2015 results before the market opens on Friday, May 8, 2015. Management will also conduct a conference call and live webcast at 9:00 am Eastern time on Friday, May 8, 2015 to review the Company's results. Participating in the conference call will be Carl Lee, Jr., CEO and President, Rick Puckett, Executive Vice President, Chief Financial Officer and Chief Administrative Officer and Mark Carter, Vice President and Investor Relations Officer.

The conference call and accompanying slide presentation will be webcast live through the Investor Relations section of the Company's website, www.snyderslance.com. In addition, the slide presentation will be available at www.snyderslance.com to download and print approximately 30 minutes before the webcast.

To participate in the conference call, the dial-in number is (844) 830-1960 for U.S. callers or (315) 625-6883 for international callers. The conference ID is 25419324. A continuous telephone replay of the call will be available between 12:00pm on May 8 and midnight on May 15. The replay telephone number is (855) 859-2056 for U.S. callers or (404) 537-3406 for international callers. The replay access code is 25419324. Investors may also access a web-based replay of the conference call at www.snyderslance.com.

About Snyder's-Lance, Inc.

Snyder's-Lance, Inc., headquartered in Charlotte, NC, manufactures and markets snack foods throughout the United States and internationally. Snyder's-Lance's products include pretzels, sandwich crackers, pretzel crackers,

Press Release: Snyder's-Lance, Inc. to Release First Quarter 2015 Results on Friday, May 8, Before Market Opens. Will Host Conference Call and Webcast at 9:00 a....

potato chips, cookies, tortilla chips, restaurant style crackers, nuts and other snacks. Snyder's-Lance has manufacturing facilities in North Carolina, Pennsylvania, Indiana, Georgia, Arizona, Massachusetts, Florida, Ohio and Wisconsin. Products are sold under the Snyder's of Hanover(R), Lance(R), Cape Cod(R), Snack Factory(R) **Pretzel Crisps(R)**, Krunchers!(R), Tom's(R), Archway(R), Jays(R), Stella D'oro(R), Eatsmart(TM), O-Ke-Doke(R) and other brand names along with a number of third party brands. Products are distributed nationally through grocery and mass merchandisers, convenience stores, club stores, food service outlets and other channels. LNCE-E

Logo - <http://photos.prnewswire.com/prnh/20150410/197788LOGO>

To view the original version on PR Newswire, visit: <http://www.prnewswire.com/news-releases/snyders-lance-inc-to-release-first-quarter-2015-results-on-friday-may-8-before-market-opens--will-host-conference-call-and-webcast-at-900-am-eastern-on-friday-may-8-300064081.html>

SOURCE Snyder's-Lance, Inc.

/Web site: <http://www.snyderslance.com>

(END) Dow Jones Newswires

April 10, 2015 11:00 ET (15:00 GMT)

Notes

PUBLISHER: Dow Jones & Company, Inc.

Load-Date: April 11, 2015

End of Document

Snyder's-Lance, Inc. to Release First Quarter 2015 Results on Friday, May 8, Before Market Opens. Will Host Conference Call and Webcast at 9:00 am Eastern on Friday, May 8.

PR Newswire

April 10, 2015 Friday 11:00 AM EST

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Length: 449 words

Dateline: CHARLOTTE, N.C., April 10, 2015

Body

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SOURCE Snyder's-Lance, Inc.

CONTACT: Mark Carter, Investor Relations Officer (704) 557-8386

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The stat pool: the grocery headquarters annual State of the Industry Almanac takes a comprehensive look at dozens of supermarket categories; STATE OF THE INDUSTRY ALMANAC 2015

Grocery Headquarters

April 1, 2015

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Section: Pg. 60(26); Vol. 81; No. 4; ISSN: 1094-1088

Length: 32548 words

Body

[ILLUSTRATION OMITTED]

What do consumers want?

That is the \$64,000 question. Figuring it out can mean the difference between swimming in the green or drowning in red ink. In an effort to supply a little bit of clarity, each year the editors at Grocery Headquarters dive head first into a pool of numbers.

Grocery Headquarters' State of the Industry Almanac, published in conjunction with Chicago-based market research firm IRI, provides the top 10 brands and five best-selling vendors in a wide array of categories covering every aisle of the store. Sales figures are for the 52-week period ended January 25.

While there are never any guarantees, there certainly are some smart bets for retailers to make. Alcohol is one of them.

The beer/alcohol/cider category and wine category, third and seventh best selling categories respectively, were up in both dollars and units for the tracked period. Beer sales were at \$9.7 billion, up 3.7%, while wine pushed past the \$7 billion mark, up 4.4%. Lower down on the top 50 list, spirits/liquor (27th) sales were up 3.1% in dollars, topping \$3 billion and up 2.5% in units.

"We are amazed at how well alcohol has performed at our chain over the last few years," says a Midwest retailer, who adds that his operation is allotting more space than ever for spirits.

"Consumers make it clear that they want convenience when shopping and that extends to the alcoholic beverage market."

And what goes better with beer and wine than salty snacks and cheese?

Salty snacks was the fourth best selling category with sales of more than \$9.5 billion, up almost 3%, units were up 2.6%. Two spots below salty snacks and one spot above wine was natural cheese. The category was up 7% in dollars, for \$7.1 billion in sales and up 1% in units.

After a night of indulgence, or overindulgence, what are consumers in need of? Coffee and bottled water of course. Just outside the top 10, in 11th and 12th respectively, both had good years as well. Each accounted for \$4.7 billion in sales, up 5.4% and 5.3% in dollars and 5.3% (coffee) and 3.4% (water) in units.

Other categories that had strong years in both dollars and units included refrigerated salad/coleslaw (dollars up 10.1%, units up 8.3%) and refrigerated meat (dollars up 22.3%, units up 8.7%).

Of course it was not all candy and roses, (except in the candy and floral departments), as there were some categories that underperformed, none bigger than the carbonated beverage segment. It may be a reach to say a category that was the top selling in the store, generating almost \$11 billion in sales, was a disappointment, but carbonated beverages were down once again, about 2% for both units and dollars.

"It's like watching a long lost friend go away," says the same Midwest retailer. "Consumers want so many different options in the beverage category and each new innovation just takes a little bit more away from carbonated beverages. The interesting part of all of this is that Coca-Cola and Pepsi are the leaders in these other segments as well."

[ILLUSTRATION OMITTED]

The stat pool: the grocery headquarters annual State of the Industry Almanac takes a comprehensive look at dozens of supermarket categories; STATE OF THE INDUST....

Other categories to have off years were eighth-best cold cereal, down 4% in dollars and 3.5% in units, ninth-best frozen dinners and entrees (-3.5%, -5.7%) and laundry detergent (-3.5%, -2.9%).

As always, we encourage you to review our annual almanac and share your thoughts. We welcome your feedback.

--WRITTEN AND DEVELOPED BY THE GROCERY HEADQUARTERS EDITORIAL STAFF--

TOP 50 SUPERMARKET CATEGORIES

\$ SALES CATEGORY	CHANGE VS. (MILLIONS)	UNIT SALES YEAR AGO	CHANGE VS. (MILLIONS)	YEAR AGO
Carbonated beverages	\$10,922.8	-1.9%	4,876.0	-2.1%
Milk	10,855.4	2.9	3,445.3	-2.9
Beer/ale/alcoholic cider	9,721.7	3.7	1,104.6	3.4
Salty snacks	9,581.7	2.9	3,842.6	2.6
Fresh bread & rolls	9,484.6	-0.3	4,069.3	-0.9
Natural cheese	8,847.2	7.0	2,589.9	1.0
Wine	7,172.0	4.4	764.2	2.2
Cold cereal	5,354.6	-4.0	1,720.7	-3.5
Frozen dinners/entrees	5,184.4	-3.5	1,898.7	-5.7
Yogurt	5,153.6	3.2	3,934.6	0.1
Coffee	4,751.7	5.4	747.1	5.3
Bottled water	4,740.7	5.3	2,427.1	3.4
Ice cream/sherbet	4,319.2	0.9	1,197.5	-0.6
Crackers	4,250.9	0.3	1,615.4	0.8
Refrigerated juices/drinks	4,183.3	-2.9	1,410.2	-5.4
Breakfast meats	4,110.2	8.4	973.6	2.2
Cookies	4,072.7	0.2	1,548.9	0.1
Refrigerated fresh eggs	4,068.2	10.9	1,538.1	-0.1
Soup	3,813.5	-0.8	2,840.0	-2.1
Cigarettes	3,797.9	-0.6	518.0	-0.9
Luncheon meats	3,501.1	3.1	1,109.0	-1.5
Total chocolate candy	3,494.9	2.7	1,736.7	-1.1
Refrigerated salad/coleslaw	3,472.2	10.1	1,244.8	8.3
Bottled juices--ss	3,163.3	-1.8	1,350.6	-2.4
Toilet tissue	3,099.8	-0.2	565.8	-2.0
Dog food	3,069.5	-0.8	817.4	-1.2
Spirits/liquor	3,031.9	3.1	198.1	2.5
Frozen pizza	2,825.2	-0.1	873.3	-3.5
Frozen novelties	2,669.5	-0.1	814.8	-2.8
Frozen/ refrigerated poultry	2,553.6	8.5	452.4	6.9
Frozen seafood	2,516.1	3.3	317.4	-4.2
Snack bars/ granola bars	2,435.0	3.1	1,052.0	3.0
Dinner sausage	2,307.2	8.8	592.5	1.5
Vegetables	2,262.3	-1.1	2,197.5	-0.8
Spices/ seasonings	2,233.6	2.4	852.1	0.9
Laundry detergent	2,220.8	-3.5	347.8	-2.9
Creams/creamers	2,193.0	5.4	767.0	1.1
Shortening & oil	2,161.8	-0.5	477.9	0.8
Baby formula/ electrolytes	2,069.7	0.3	134.3	-3.4

The stat pool: the grocery headquarters annual State of the Industry Almanac takes a comprehensive look at dozens of supermarket categories; STATE OF THE INDUST....

Cat food	2,068.4	-0.1	1,435.9	-0.3
Processed cheese	1,996.7	0.1	564.2	-6.5
Paper towels1,893.9	0.1	472.1	-2.7	
Snack nuts/seeds/ corn nuts	1,889.9	4.6	17.2	3.4
Refrigerated meat	1,872.9	22.3	278.0	8.7
Butter/butter blends	1,851.3	14.3	553.6	-2.2
Mexican foods	1,801.5	2.9	852.0	3.4
Frozen plain1,799.7	0.0	1,068.9	0.2	
vegetables				
Processed frzen/ refrig poultry	1,781.2	1.6	319.1	-1.9
Pastry/doughnuts	1,756.3	4.1	644.0	4.2
Refrigerated side dishes	1,713.8	7.7	444.0	2.7

52 WEEKS ENDED JANUARY 25.

Source: IRI

DOMESTIC BEER

Consumers still have a thirst for domestic beer. Sales topped \$ 10.5 billion, up 3.2% versus last year. The increase can be attributed to a higher average price per case (\$ 19.85) as case sales were relatively flat, (up 0.7%).Top brands remain Bud Light, Coors Light and Miller Lite capturing market share of 19.1%, 9.7% and 8.2% respectively.

TOP BRANDS	\$ SALES (MILLIONS)	CHANGE VS.		\$ SHARE	CHANGE VS. YEAR AGO
		YEAR AGO	SHARE		
Bud Light	\$2,010.2	2.2%	19.1%	-0.2%	
Coors Light	1,030.4	-1.5	9.7	-0.4	
Miller Lite	862.6	1.3	8.2	-0.2	
Budweiser	718.7	-1.5	6.8	-0.3	
Michelob Ultra Light	428.2	11.1	4.0	0.2	
Natural Light	343.8	-1.8	3.2	-0.2	
Busch Light	318.5	1.3	3.0	-0.1	
Busch 195.7	-0.8	1.8	-0.1		
Miller High Life	195.5	-1.1	1.8	-0.1	
Keystone Light	171.3	-5.4	1.6	-0.2	
Blue Moon Belgian White Ale	147.6	4.0	1.4	0.0	
Yuengling Traditional Lager	136.2	8.2	1.3	0.1	
Pabst Blue Ribbon	131.1	1.5	1.2	0.0	
Bud Light Lime	127.5	-6.0	1.2	-0.1	
Bud Light Platinum	111.2	-16.9	1.0	-0.2	
Coors	109.6	6.1	1.0	0.0	
Samuel Adams Seasonal	108.2	6.2	1.0	0.0	
Natural Ice	100.1	0.6	0.9	0.0	
Redds Apple Ale	82.2	9.6	0.7	0.1	
Sierra Nevada Pale Ale	77.9	4.3	0.7	0.0	
TOTAL	10,521.9	3.2	100.0	0.0	
TOP BRANDS	CASES (MILLIONS)	CHANGE VS. YEAR AGO	AVG. PRICE PER CASE		

The stat pool: the grocery headquarters annual State of the Industry Almanac takes a comprehensive look at dozens of supermarket categories; STATE OF THE INDUST....

Bud Light	108.8	1.2%	\$18.47
Coors Light	55.8	-2.3	18.44
Miller Lite	47.1	0.5	18.31
Budweiser	38.9	-2.4	18.46
Michelob Ultra Light	18.6	9.6	22.98
Natural Light	23.5	-3.0	14.60
Busch Light	22.2	0.6	14.31
Busch 13.3	-1.7	14.71	
Miller High Life	12.9	-2.6	15.08
Keystone Light	12.3	-6.5	13.87
Blue Moon Belgian	4.9	2.8	29.84
White Ale			
Yuengling Traditional Lager	6.7	8.3	20.33
Pabst Blue Ribbon	8.3	0.0	15.73
Bud Light Lime	5.1	-6.5	24.83
Bud Light Platinum	4.4	-18.6	24.88
Lager			
Coors	5.9	4.1	18.41
Samuel Adams Seasonal		3.4	4.4
Natural Ice	6.9	0.1	14.32
Redds Apple Ale	2.7	10.8	29.76
Sierra Nevada Pale Ale		2.4	3.6
			31.20
TOTAL	530.1	0.7	19.85

TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25.

Source: IRI

IMPORTED BEER

Dollar and case sales of imported beer were both up, 4.5% and 3.2% respectively, signifying consumers' willingness to pay a premium for the category. Third best selling brand, Modelo Especial was the rising star with sales up 23%. Dos Equis XX enjoyed the second most growth of brands in the top 10 with an increase of 16.3%. Corona Extra (23% market share) and Heineken (13.4%) were the top selling brands.

TOP BRANDS	\$ SALES (MILLIONS)	CHANGE VS. YEAR AGO		\$ SHARE	CHANGE VS. YEAR AGO
		CHANGE VS.	YEAR AGO		
Corona Extra	\$626.0	4.1%	23.3%	-0.1%	
Heineken	361.9	2.7	13.4	-0.2	
Modelo Especial	280.4	23.0	10.4	1.5	
Corona Light	177.8	3.1	6.6	-0.1	
Stella Artois Lager	159.7	10.7	5.9	0.3	
Dos Equis XX Lager	146.6	16.3	5.4	0.5	
Especial					
Tecate	87.6	-3.7	3.2	-0.3	
Guinness Draught	57.5	-1.6	2.1	-0.1	
Pacifico	49.8	1.9	1.8	-0.1	
Newcastle Brown Ale	45.9	-14.9	1.7	-0.4	
Heineken Premium	44.2	-10.3	1.6	-0.2	
Light Lager					
Becks	43.7	7.3	1.6	0.0	
Labatt Blue	40.0	-5.3	1.5	-0.2	

The stat pool: the grocery headquarters annual State of the Industry Almanac takes a comprehensive look at dozens of supermarket categories; STATE OF THE INDUST....

Labatt Blue Light	36.2	-3.4	1.4	-0.1
Negra Modelo	33.4	6.9	1.3	0.0
Dos Equis XX Ambar	29.7	3.1	1.1	0.0
Lager				
Tecate Light	29.2	42.1	1.1	0.3
Guinness Extra Stout		28.5	7.1	1.1
Fosters Lager	27.3	-11.9	1.0	-0.2
Beers of Mexico	25.4	4.8	0.9	0.0
Variety Pack				
TOTAL	\$2,685.6	4.5	100.0	0.0

CASES TOP BRANDS	CHANGE VS. (MILLIONS)	AVG. PRICE YEAR AGO	PER CASE
Corona Extra	22.4	2.1%	\$27.94
Heineken	13.0	1.7	27.63
Modelo Especial	10.8	19.6	25.78
Corona Light	6,.3	1.2	28.10
Stella Artois Lager		4.7	9.7
Dos Equis XX Lager	5.2	15.8	27.80
Especial			
Tecate	4.9	-5.0	17.89
Guinness Draught	1.6	-3.2	34.56
Pacifico	1.8	-0.4	27.44
Newcastle Brown Ale		1.5	-15.9
Heineken Premium	1.5	-11.1	30.17
Light Lager			
Becks	1.7	13.8	25.57
Labatt Blue	2.2	-5.5	18.17
Labatt Blue Light	2.0	-3.7	17.33
Negra Modelo	1.1	5.3	29.45
Dos Equis XX Ambar	1.0	2.9	27.73
Lager			
Tecate Light	1.7	39.0	17.19
Guinness Extra Stout		.818	7.5
Fosters Lager	1.1	-12.4	34.86
Beers of Mexico	.992	3.2	23.91
Variety Pack			
TOTAL	98.8	3.2	25.65
			27.16

TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25.

Source: IRI

READY-TO-EAT CEREAL

Of the top five manufacturers, only Post was able to improve dollar sales, up almost 2%. Consumers seemed to be looking for something sweet as Cinnamon Toast Crunch and Froot Loops were the top gaining brands, up 7.6% and 4.9% respectively. Honey Bunches of Oats was also up 4.9%.

\$ SALES TOP VENDORS	CHANGE VS. (MILLIONS)	YEAR AGO	SHARE

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General Mills	\$2,712.6	-3.4%	30.4%
Kellogg Co.	2,655.6	-5.4	29.8
Post Holdings	1,005.0	1.9	11.3
Private label	760.3	-5.0	8.5
Mom Brands	592.1	-10.3	6.6

TOP VENDORS	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	AVG. PRICE PER UNIT
General Mills	828.1	-2.8%	\$3.28
Kellogg Co.	821.5	-4.1	3.23
Post Holdings	308.3	-2.1	3.26
Private label	305.8	-5.4	2.49
Mom Brands	163.7	-8.9	3.62

TOP BRANDS (MILLIONS)	\$ SALES	CHANGE VS. YEAR AGO	SHARE
Private label	\$760.3	-5.0%	8.5%
General Mills Hny Nt Cheerios	491.5	-6.2	5.5
Kelloggs Frosted Flakes	425.8	-4.3	4.8
Post Honey Bunches of Oats	393.8	4.9	4.4
General Mills Cheerios	355.9	4.3	4.0
General Mills Cinn Tst Crnch	326.0	7.6	3.7
Kelloggs Frosted Mini Wheats	263.4	-5.5	3.0
Kelloggs Froot Loops	261.2	4.9	2.9
General Mills Lucky Charms	256.2	-5.5	2.9
Kelloggs Raisin Bran	180.5	-0.5	2.0
CATEGORY TOTAL	8,914.0	-3.8	100.0

TOP BRANDS (MILLIONS)	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	AVG. PRICE PER UNIT
Private label	305.8	-5.4%	\$2.49
General Mills Hny Nt Cheerios	142.3	-3.4	3.45
Kelloggs Frosted Flakes	130.4	-2.2	3.26
Post Honey Bunches of Oats	118.3	2.8	3.33
General Mills Cheerios	110.7	4.2	3.21
General Mills Cinn Tst Crnch	97.6	7.8	3.34
Kelloggs Frosted Mini Wheats	77.2	-5.4	3.41
Kelloggs Froot Loops	86.5	7.4	3.02
General Mills Lucky Charms	79.0	-3.0	3.24
Kelloggs Raisin Bran	53.6	-2.3	3.36
CATEGORY TOTAL	2,786.6	-3.7	3.20

TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25.

Source: IRI

HOT CEREAL/OATMEAL

It was a good year for the category. Dollar sales were up 4%, topping \$1.3 billion while units were also up, 3.2%. Top brand Quaker lengthened its lead, up almost 7% for a dollar share of 45.2%. Store brands held the second spot, with 23.9% of dollars, though down 2.5%.

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\$ SALES CHANGE VS.			
TOP VENDORS	(MILLIONS)	YEAR AGO	SHARE
Quaker Oats Co.	\$749.9	5.6%	57.6%
Private label	310.5	-2.5	23.9
B & G Foods	73.9	-2.8	5.7
Bob's Red Mill Natural Foods		29.0	15.4
Red Engine Foods	20.7	1.6	1.6

UNIT SALES CHANGE VS.			
TOP VENDORS	(MILLIONS)	YEAR AGO	AVG. PRICE PER UNIT
Quaker Oats Co.	258.5	8.6%	\$2.90
Private label	148.2	-3.9	2.09
B & G Foods	20.7	-3.0	3.57
Bob's Red Mill Natural Foods		6.4	11.8
Red Engine Foods	8.6	-34.7	2.40

\$ SALES CHANGE VS.			
TOP BRANDS (MILLIONS)	YEAR AGO	SHARE	
Quaker	\$588.1	6.9%	45.2%
Private label	310.5	-2.5	23.9
Cream of Wheat	68.6	-1.3	5.3
Quaker Real Medleys	44.1	0.2	3.4
Quaker Lower Sugar	41.5	0.2	3.2
Bob's Red Mill	29.0	15.4	2.2
Quaker High Fiber	23.6	-10.9	1.8
Quaker Weight Control	21.9	-9.3	1.7
Kellogg's Special K Nourish		18.3	51.6
Better Oats Oat Revolution	12.2	11.6	0.9
CATEGORY TOTAL	1,301.1	4.0	100.0

UNIT SALES CHANGE VS.			
TOP BRANDS (MILLIONS)	YEAR AGO	AVG. PRICE PER UNIT	
Quaker	190.5	12.8%	\$3.09
Private label	148.2	-3.9	2.09
Cream of Wheat	18.7	-1.9	3.66
Quaker Real Medleys	27.0	0.3	1.63
Quaker Lower Sugar	14.2	0.2	2.92
Bob's Red Mill	16.4	11.8	4.54
Quaker High Fiber	8.3	-9.8	2.82
Quaker Weight Control	7.6	-7.8	2.85
Kellogg's Special K Nourish		6.6	53.9
Better Oats Oat Revolution	4.7	-27.4	2.57
CATEGORY TOTAL	479.2	3.2	2.71

TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25.

Source: IRI

REFRIGERATED SKIM/LOWFAT MILK

Unit sales were down 5.5%, dipping under 3 billion. Dollars sales were flat, up, 0.8%, due

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to an 11 -cent increase in average price. The top national brand was Hood, accounting for 3.4% of dollar sales, up 7.0% from last year. Horizon was the No. 2 national brand (3.4%), up 2.1%. Private label had a market share of 64.5%.

\$ SALES CHANGE VS.

TOP VENDORS (MILLIONS) YEAR AGO SHARE

Private label	\$6,208.3	1.9%	64.5%
HP Hood	423.2	5.3	4.4
Dean Foods	344.4	-5.6	3.6
Whitewave Foods Co.	331.7	1.7	3.4
Prairie Farms Dairy	175.7	5.5	1.8

UNIT SALES CHANGE VS. AVG. PRICE

TOP VENDORS (MILLIONS) YEAR AGO PER UNIT

Private label	1,992.7	-4.9%	\$3.12
HP Hood	104.0	2.0	4.07
Dean Foods	110.6	-11.5	3.11
Whitewave Foods Co.	69.6	-3.0	4.77
Prairie Farms Dairy	56.0	-3.0	3.14

\$ SALES CHANGE VS.

TOP BRANDS (MILLIONS) YEAR AGO SHARE

Private label	\$6,208.3	1.9%	64.5%
Hood Lactaid	342.5	7.0	3.6
Horizon Organic	330.9	2.1	3.4
Prairie Farms	167.9	6.9	1.7
Hiland	153.8	13.4	1.6
Deans	134.5	-5.3	1.4
Deans Land O Lakes	110.5	-12.5	1.1
Organic Valley	97.9	4.8	1.0
Hood	62.7	1.8	0.7
Alta Dena	62.5	-3.0	0.6

CATEGORY TOTAL 9,625.5 0.8 100.0

UNIT SALES CHANGE VS. AVG. PRICE

TOP BRANDS (MILLIONS) YEAR AGO PER UNIT

Private label	1,992.7	-4.9%	\$3.12
Hood Lactaid	77.9	4.1	4.39
Horizon Organic	69.4	-2.5	4.77
Prairie Farms	53.6	-1.4	3.13
Hiland	46.7	6.1	3.29
Deans	43.7	-11.9	3.07
Deans Land O Lakes	34.1	-18.9	3.24
Organic Valley	21.4	-0.2	4.57
Hood	20.8	-1.7	3.01
Alta Dena	18.9	-4.6	3.31

CATEGORY TOTAL 2,989.5 -5.5 3.22

TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25.

Source: IRI

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NATURAL CHEESE SLICES

Sales were strong, up 12.6% in dollars, totaling just below \$1.9 billion. Units were also up a solid 5.9%. Store brands led the way with 40.5% of dollars, followed by Sargento at 23.5%. Kraft brands had a good year as the vendor was up 12.5% for the year.

TOP VENDORS	\$ SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE
Private label	\$768.3	14.2%	40.5%
Sargento Food Co.	502.7	8.5	26.5
Kraft Foods Group	192.3	12.5	10.1
Tillamook County Creamery	68.9	9.2	3.6
Crystal Farms	51.1	22.4	2.7

TOP VENDORS	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	AVG. PRICE PER UNIT
Private label	245.5	6.3%	\$3.13
Sargento Food Co.	156.1	0.8	3.22
Kraft Foods Group	64.4	8.9	2.98
Tillamook County Creamery	13.9	8.2	4.97
Crystal Farms	14.3	22.2	3.57

TOP BRANDS	\$ SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE
Private label	\$768.3	14.2%	40.5%
Sargento	445.5	5.3	23.5
Kraft	70.6	16.0	3.7
Kraft Big Slice	69.7	16.2	3.7
Tillamook	67.9	9.1	3.6
BelGioioso	47.1	11.3	2.5
Crystal Farms	36.8	32.0	1.9
Kraft Cracker Barrel	35.8	70.8	1.9
Boar's Head	25.6	34.6	1.3
Sargento Natural Blends	24.6	-7.6	1.3
CATEGORY TOTAL	1,898.5	12.6	100.0

TOP BRANDS	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	AVG. PRICE PER UNIT
Private label	245.5	6.3%	\$3.13
Sargento	137.8	-2.1	3.23
Kraft	23.7	12.5	2.98
Kraft Big Slice	25.2	12.5	2.76
Tillamook	13.6	8.2	4.99
BelGioioso	7.3	4.9	6.46
Crystal Farms	11.7	29.5	3.15
Kraft Cracker Barrel	11.0	67.9	3.25
Boar's Head	4.1	26.2	6.31
Sargento Natural Blends	8.1	-14.4	3.04
CATEGORY TOTAL	560.3	5.9	3.39

TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET

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RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS
FOR THE 52 WEEKS ENDED JANUARY 25.

Source: IRI

NATURAL SHREDDED CHEESE

A 20-cent average price increase led to a 9% gain in dollars, despite flat unit sales. The top national vendor was Kraft with 21.7% of dollars, up 8.3%. However, private label was the clear leader with 57.7% of dollars, up 8.6%. Category sales pushed past \$4.6 billion, units were just below 1.4 billion.

TOP VENDORS	\$ SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE
Private label	\$2,690.2	8.6%	57.7%
Kraft Foods Group	1,009.6	8.3	21.7
Sargento Food Co.	396.0	1.6	8.5
Crystal Farms	137.3	6.8	2.9
Dairy Farmers of America	97.8	11.9	2.1

TOP VENDORS	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	AVG. PRICE PER UNIT
Private label	783.5	-1.6%	\$3.43
Kraft Foods Group	320.7	1.2	3.15
Sargento Food Co.	121.2	-6.9	3.27
Crystal Farms	46.7	-4.8	2.94
Dairy Farmers of America	37.3	1.5	2.62

TOP BRANDS	\$ SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE
Private label	\$2,690.2	8.6%	57.7%
Kraft	869.3	8.9	18.6
Sargento	354.9	0.9	7.6
Crystal Farms	129.3	6.7	2.8
Kraft Philadelphia	108.6	7.2	2.3
Borden	86.5	11.2	1.9
American Heritage	44.8	452.9	1.0
Sargento Artisan Blends		30.1	-13.1
Belgioioso	27.6	15.4	0.6
Tillamook	26.3	6.9	0.6
CATEGORY TOTAL	4,663.0	9.0	100.0

TOP BRANDS	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	AVG. PRICE PER UNIT
Private label	783.5	-1.6%	\$3.43
Kraft	276.8	1.3	3.14
Sargento	107.7	-7.9	3.30
Crystal Farms	44.2	-4.4	2.93
Kraft Philadelphia	37.0	1.1	2.93
Borden	34.6	1.6	2.50
American Heritage	15.8	504.0	2.84
Sargento Artisan Blends		9.7	-19.3
Belgioioso	6.7	13.6	4.15

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Tillamook	6.5	0.7	4.05
CATEGORY TOTAL	1,399.7	0.0	3.33

TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25.

Source: IRI

FRESH EGGS

Eggland's Best was the top national brand with 13.2% of dollar sales and 13.8% unit sales. Overall the category accounted for \$5.6 billion in sales, up 11.6%. Category unit sales topped 2 billion, up 1.2%. The average price per unit was \$2.65, 21 -cents higher than last year.

\$ SALES CHANGE VS.			
TOP VENDORS	(MILLIONS)	YEAR AGO	SHARE
Private label	\$2,984.8	10.9%	52.9%
Eggland's Best	842.4	16.0	14.9
Country Creek Farms	541.5	27.8	9.6
Cal Maine Foods	158.3	9.3	2.8
Sunny Farms Corp.	98.8	-21.6	1.8

UNIT SALES CHANGE VS. AVG. PRICE			
TOP VENDORS	(MILLIONS)	YEAR AGO A.	PER UNIT
Private label	1,225.3	-0.8%	\$2.44
Eggland's Best	255.8	13.2	3.29
Country Creek Farms	197.2	16.6	2.75
Cal Maine Foods	44.9	3.3	3.52
Sunny Farms Corp.	39.6	-25.8	2.50

\$ SALES CHANGE VS.			
TOP BRANDS (MILLIONS)	YEAR AGO	SHARE	
Private label	\$2,984.8	10.9%	52.9%
Eggland's Best	743.0	16.8	13.2
Great Day Farmers Market	401.7	22.4	7.1
Cal Maine Sunup	105.5	5.4	1.9
Sunny Farms	98.8	-21.6	1.8
Eggland's Best Land O' Lakes		86.0	14.3
Sauder's Eggs	63.1	6.0	1.1
Dutch Farms	57.9	-1.6	1.0
Hillandale Farms	50.8	3.9	0.9
Farmhouse	46.1	16.7	0.8
CATEGORY TOTAL	5,643.2	11.6	100.0

UNIT SALES CHANGE VS. AVG. PRICE			
TOP BRANDS (MILLIONS)	YEAR AGO A.	PER UNIT	
Private label	1,225.3	-0.8%	\$2.44
Eggland's Best	226.2	13.8	3.28
Great Day Farmers Market	158.5	14.1	2.53
Cal Maine Sunup	30.7	0.0	3.44
Sunny Farms	39.6	-25.8	2.50

The stat pool: the grocery headquarters annual State of the Industry Almanac takes a comprehensive look at dozens of supermarket categories; STATE OF THE INDUST....

Eggland's Best Land O' Lakes	25.4	13.0	3.38
Sauder's Eggs	20.2	-2.7	3.12
Dutch Farms	29.6	-15.6	1.96
Hillandale Farms	23.3	-5.5	2.18
Farmhouse	12.9	10.4	3.59
CATEGORY TOTAL	2,132.50	1.2	2.65

TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25.

Source: IRI

FROZEN HANDHELD ENTREES (NON-BREAKFAST)

White Castle branded products enjoyed the most growth, up almost 25%. Nestle USA's Hot Pockets was the best-selling brand with 25.8% of dollars. Ruiz Food's El Monterey brand was second, up 6.1% in dollars for 12.8% market share. Overall category sales approached \$2.5 billion.

TOP VENDORS	\$ SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE
Nestle USA	\$838.8	-10.7%	34.5%
Ruiz Food Products	321.2	6.7	13.2
Hillshire Brands Co.	174.8	6.6	7.2
The J.M. Smucker Co.	147.0	10.8	6.0
White Castle Foods Products	144.6	24.8	5.9

TOP VENDORS	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	AVG. PRICE PER UNIT
Nestle USA	260.1	-14.4%	\$3.22
Ruiz Food Products	104.2	3.0	3.08
Hillshire Brands Co.	31.1	15.1	5.62
The J.M. Smucker Co.	30.3	8.6	4.85
White Castle Foods Products	25.4	21.3	5.69

TOP BRANDS	\$ SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE
Hot Pockets	\$628.3	-5.3%	25.8%
El Monterey	312.6	6.1	12.8
State Fair	153.0	-3.1	6.3
Smucker's Uncrustables	147.0	10.8	6.0
White Castle	144.6	24.8	5.9
Lean Pockets	138.0	-18.3	5.7
Foster Farms	105.2	0.4	4.3
Private label	101.0	3.3	4.1
Jose Ole	60.8	1.7	2.5
Amy's	60.6	11.3	2.5
CATEGORY TOTAL	2,433.3	-0.1	100.0

TOP BRANDS	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	AVG. PRICE PER UNIT
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The stat pool: the grocery headquarters annual State of the Industry Almanac takes a comprehensive look at dozens of supermarket categories; STATE OF THE INDUST....

Hot Pockets	172.3	-8.9%	\$3.65
E1 Monterey	99.5	2.9	3.14
State Fair	26.2	3.0	5.83
Smucker's Uncrustables	30.3	8.6	4.85
White Castle	25.4	21.3	5.69
Lean Pockets	59.5	-17.9	2.32
Foster Farms	17.4	1.1	6.05
Private label	44.8	-6.3	2.26
Jose Ole	45.9	10.3	1.32
Amy's	23.3	12.4	2.60
CATEGORY TOTAL	742.9	-4.5	3.28

TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25.

Source: IRI

SINGLE-SERVE FROZEN DINNERS/ENTREES

Despite a marginal price per unit increase (4-cents), dollars and units were off, 3.9% and 5.6% respectively. ConAgra Foods has closed the gap on Nestle USA for top vendor spot just .6% shy (29.4% to 28.6%). Both companies had sales greater than \$1.2 billion. Overall category sales were \$4.2 billion.

TOP VENDORS	\$ SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE
Nestle USA	\$1,251.9	-10.4%	29.4%
ConAgra Foods	1,225.6	-4.0	28.8
Heinz North America	410.3	-14.2	9.6
Bellisio Foods	373.4	2.5	8.8
Amy's Kitchen	213.1	21.3	5.0

TOP VENDORS	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	AVG. PRICE PER UNIT
Nestle USA	484.9	-12.5%	\$2.58
ConAgra Foods	683.5	-4.3	1.79
Heinz North America	184.1	-15.2	2.23
Bellisio Foods	298.0	-1.6	1.25
Amy's Kitchen	55.1	24.5	3.87

TOP BRANDS	\$ SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE
Stouffer's	\$539.1	-3.2%	12.7%
Marie Callender's	392.1	20.9	9.2
Weight Watchers Smart Ones	336.3	-12.3	7.9
Banquet	314.9	-6.5	7.4
Lean Cuisine Culnry Collection	237.1	-6.8	5.6
Lean Cuisine Simple Favorites	225.6	-6.0	5.3
Healthy Choice Cafe Steamers	140.0	24.8	3.3
Hungry-Man	137.6	1.7	3.2
Healthy Chce Tp Chf Cfe Stmers	111.2	-3.7	2.6
Healthy Choice	106.9	-38.4	2.5

The stat pool: the grocery headquarters annual State of the Industry Almanac takes a comprehensive look at dozens of supermarket categories; STATE OF THE INDUST....

CATEGORY TOTAL	4,257.6	-3.9	100.0
UNIT SALES CHANGE VS. AVG. PRICE			
TOP BRANDS (MILLIONS)	YEAR AGO	PER UNIT	
Stouffer's 197.7	-5.9%	\$2.73	
Marie Callender's 160.9	28.8	2.44	
Weight Watchers Smart Ones 156.7	-13.5	2.15	
Banquet 309.8	-7.1	1.02	
Lean Cuisine Culnry Collection	90.0	-7.6	2.63
Lean Cuisine Simple Favorites	103.4	-11.4	2.18
Healthy Choice Cafe Steamers	56.6	27.2	2.47
Hungry-Man 51.4	1.0	2.68	
Healthy Chce Tp Chf Cfe Stmers	45.6	-1.7	2.44
Healthy Choice 44.1	-40.9	2.42	
CATEGORY TOTAL	1,988.6	-5.6	2.14

TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25.

Source: IRI

MULTI-SERVE FROZEN DINNERS/ENTREES

The category struggled last year as dollars were down 1.5% while units were down 4.5%. Overall sales topped \$2 billion, led by Stouffer's and its 37.6% market share. On the vendor side, third best Birds Eye Foods was up 9.6% in dollars, while the top two, Nestle USA (-2.6%) and ConAgra (-3.4%) were down.

\$ SALES	CHANGE VS.		
TOP VENDORS (MILLIONS)	YEAR AGO	SHARE	
Nestle USA \$797.0	-2.6%	39.8%	
ConAgra Foods 440.2	-3.4	22.0	
Birds Eye Foods 259.3	9.6	13.0	
Private label 104.3	-6.8	5.2	
Michael Angelo's Grmet Food.	69.3	10.8	3.5

UNIT SALES	CHANGE VS.	AVG. PRICE	
TOP VENDORS (MILLIONS)	YEAR AGO	PER UNIT	
Nestle USA 104.7	-9.1%	\$7.61	
ConAgra Foods 78.1	-0.8	5.64	
Birds Eye Foods 56.2	6.4	4.61	
Private label 14.1	-12.0	7.38	
Michael Angelo's Grmet Food.	7.2	5.8	9.57

\$ SALES	CHANGE VS.		
TOP BRANDS (MILLIONS)	YEAR AGO	SHARE	
Stouffer's \$753.6	0.9%	37.6%	
Birds Eye Voila 256.4	9.8	12.8	
Bertolli 164.1	-5.7	8.2	
ConAgra P F Chang's Hme Mnu 109.2	-5.1	5.5	
Private label 104.3	6.8	5.2	
Michael Angelo's 69.3	10.8	3.5	

The stat pool: the grocery headquarters annual State of the Industry Almanac takes a comprehensive look at dozens of supermarket categories; STATE OF THE INDUST....

Marie Callender's	65.0	-22.8	3.2
Banquet	60.9	10.1	3.0
Gourmet Dining	44.6	-14.6	2.2
On-Cor	33.5	8.7	1.7
CATEGORY TOTAL	2,001.7	-1.5	100.0

UNIT SALES CHANGE %S AVG. PRICE

TOP BRANDS (MILLIONS)	YEAR AGO	PER UNIT	
Stouffer's	96.5	-4.8%	\$ 7.81
Birds Eye Voila	55.9	6.5	4.58
Bertolli	24.9	-5.8	6.60
ConAgra P F Chang's Hme Mnu		15.4	2.7
Private label	14.1	-12.0	7.38
Michael Angelo's	7.2	5.8	9.57
Marie Callender's	11.3	-20.8	5.73
Banquet	20.3	6.5	3.01
Gourmet Dining	8.8	-21.5	5.09
On-Cor	10.7	6.5	3.12

CATEGORY TOTAL 322.8 -4.5 6.20

TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25.

Source: IRI

REFRIGERATED FRUIT DRINK

SunnyD is still shining, though not as brightly. The top brand was down 7.6% in dollars, 2.4% in units. Coca-Cola, with its Minute Maid brand, was the top vendor, edging out Sunny Delight 28.8% to 28.1%. Tropicana Dole Beverages was third coming in at 21.7%. Overall category dollars were down 6.3%.

\$ SALES	CHANGE VS.		
TOP VENDORS	(MILLIONS)	YEAR AGO	SHARE

Coca-Cola Co.	\$282.7	-14.2%	28.8%
Sunny Delight Beverages Co.	276.3	-5.7	28.1
Tropicana Dole Beverages	213.5	-2.1	21.7
Welch Foods	90.7	3.9	9.2
Millennium Products	32.9	60.3	3.3

TOP VENDORS	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	AVG. PRICE PER UNIT
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Coca-Cola Co.	165.7	-27.0%	\$1.71
Sunny Delight Beverages Co.	134.3	1.4	2.06
Tropicana Dole Beverages	88.3	-2.8	2.42
Welch Foods	40.3	6.5	2.25
Millennium Products	10.2	59.2	3.22

\$ SALES		CHANGE VS.		
TOP BRANDS	(MILLIONS)	YEAR AGO	SHARE	

SunnyD \$270.0 -7.6% 27.5%

The stat pool: the grocery headquarters annual State of the Industry Almanac takes a comprehensive look at dozens of supermarket categories; STATE OF THE INDUST....

Minute Maid Premium	215.3	-16.4	21.9
Tropicana Trop50	150.3	0.8	15.3
Welch's	90.7	4.7	9.2
Tropicana	62.3	-5.9	6.3
Bright & Early	37.7	1.3	3.8
GTS Kombucha Synergy	30.1	60.6	3.1
Minute Maid 17.6	3.2	1.8	
Private label	10.8	-25.4	1.1
Kevita	9.9	81.0	1.0
CATEGORY TOTAL	983.1	-6.3	100.0

TOP BRANDS	UNIT SALES	CHANGE VS.	AVG. PRICE
	(MILLIONS)	YEAR AGO	PER UNIT
SunnyD	127.7	-2.4%	\$2.11
Minute Maid Premium	117.7	-32.2	1.83
Tropicana Trop50	44.1	-1.2	3.41
Welch's	40.3	7.5	2.25
Tropicana	43.6	-2.5	1.43
Bright & Early	36.0	-0.3	1.05
GTS Kombucha Synergy	9.3	59.7	3.22
Minute Maid 5.8	2.8	3.01	
Private label	6.5	-32.8	1.68
Kevita	3.4	81.0	2.94
CATEGORY TOTAL	478.4	-12.1	2.05

TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25.

Source: IRI

BOTTLED FRUIT DRINKS-SHELF STABLE

Despite a drop of nearly 12% in dollars sales, Hawaiian Punch held onto the No. 1 brand spot with a 14.6% market share. V8 Splash was second at 11.7%. Snapple was the biggest brand gainer, up 18.1%. Overall category sales were just below \$1.5 billion.

TOP VENDORS	\$/SALES	CHANGE VS.	SHARE
	(MILLIONS)	YEAR AGO	
Dr Pepper/Snapple Group	\$320.3	-5.7%	21.4%
Campbell Soup Co.	235.8	-0.3	15.7
Tampico Beverages	122.9	1.6	8.2
Welch Foods	103.9	-11.1	6.9
Kraft Foods Group	88.2	29.1	5.9

TOP VENDORS	UNIT SALES	CHANGE VS.	AVG. PRICE	PER UNIT
	(MILLIONS)	YEAR AGO	PER UNIT	
Dr Pepper/Snapple Group	170.4	-2.7%	\$1.88	
Campbell Soup Co.	101.2	-1.2	2.33	
Tampico Beverages	84.4	1.9	1.46	
Welch Foods	37.6	-10.1	2.76	
Kraft Foods Group	76.4	16.7	1.15	

The stat pool: the grocery headquarters annual State of the Industry Almanac takes a comprehensive look at dozens of supermarket categories; STATE OF THE INDUST....

TOP BRANDS	\$ SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE
Hawaiian Punch	\$219.2	-11.7%	14.6%
V8 Splash	175.2	0.6	11.7
Tampico	122.9	1.6	8.2
Snapple	78.0	18.1	5.2
Little Hug Fruit Barrels		75.6	4.0
Private label	71.2	-16.6	4.8
Kool Aid Bursts	66.7	-0.6	4.4
Welch's	60.4	0.5	4.0
Motts for Tots	40.0	16.8	2.7
V8 V Fusion Light	27.7	-24.5	1.9
CATEGORY TOTAL	1,497.9	-1.0	100.0
TOP BRANDS	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	AVG. PRICE PER UNIT
Hawaiian Punch	109.3	-9.5%	\$2.00
V8 Splash	78.3	0.0	2.24
Tampico	84.4	1.9	1.46
Snapple	48.3	19.1	1.62
Little Hug Fruit Barrels		23.4	-3.1
Private label	42.5	-15.9	1.68
Kool Aid Bursts	64.7	-0.2	1.03
Welch's	19.1	5.2	3.16
Motts for Tots	15.7	-17.3	2.56
V8 V Fusion Light	9.0	-25.5	3.09
CATEGORY TOTAL	855.0	-1.9	1.75

TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25.

Source: IRI

REFRIGERATED ORANGE JUICE

Simply Orange was the only brand in the top 5 that showed growth, up 1.4% in dollars, though down 1.4% in units due to a 10-cent price increase. Sixth best brand, Minute Maid was also up, 5.9% in dollars and 8.0% in units. Overall the category was down almost 4% in dollars and more than 6% in units.

TOP VENDORS	\$ SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE
Tropicana Dole Beverages	\$907.3	-5.4%	29.5%
Simply Orange Juice Co.	673.8	1.4	21.9
Private label	526.5	-4.5	17.1
Citrus World	396.5	-4.6	12.9
Coca-Cola Co.	369.2	-6.1	12.0
TOP VENDORS	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	AVG. PRICE PER UNIT
Tropicana Dole Beverages	239.8	-5.9%	\$3.78

The stat pool: the grocery headquarters annual State of the Industry Almanac takes a comprehensive look at dozens of supermarket categories; STATE OF THE INDUST....

Simply Orange Juice Co.	182.3	-1.4	3.70
Private label	184.4	-8.1	2.86
Citrus World	115.2	-8.5	3.44
Coca-Cola Co.	113.5	-6.6	3.25

\$ SALES CHANGE VS.
TOP BRANDS (MILLIONS) YEAR AGO SHARE

Tropicana Pure Premium	\$873.8	-4.6%	28.4%
Simply Orange	673.8	1.4	21.9
Private label	526.5	-4.5	17.1
Florida's Natural	371.6	-4.9	12.1
Minute Maid Premium	233.7	-11.0	7.6
Minute Maid	98.9	5.9	3.2
Homemaker Premium	35.6	-11.7	1.2
Minute Maid Premium Kids Plus		32.5	0.1
Citrus World Donald Duck	20.5	9.8	0.7
Tree Ripe	19.0	10.1	0.6
CATEGORY TOTAL	3,076.6	-3.9	100.0

UNIT SALES CHANGE VS. AVG. PRICE
TOP BRANDS (MILLIONS) YEAR AGO PER UNIT

Tropicana Pure Premium	229.0	-4.7%	\$3.82
Simply Orange	182.3	-1.4	3.70
Private label	184.4	-8.1	2.86
Florida's Natural	104.3	-9.2	3.56
Minute Maid Premium	68.0	-12.6	3.43
Minute Maid	34.0	8.0	\$2.91
Homemaker Premium	14.3	-19.8	2.49
Minute Maid Premium Kids Plus		9.9	-4.3
Citrus World Donald Duck	9.00	8.4	2.27
Tree Ripe	8.8	9.5	2.16
CATEGORY TOTAL	903.5	-6.2	3.40

TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25.

Source: IRI

CHOCOLATE CANDY SNACK SIZE

Snacking is down ... at least when it comes to candy. Dollars were off by 3.6% and units by 5%. Reeses, Snickers and Kit Kat were the top three brands and the only ones with double-digit market share (14.5%, 13.8% and 11.7% respectively). Hershey was the top vendor with 53.9% dollar share.

\$ SALES	CHANGE VS.		
TOP VENDORS	(MILLIONS)	YEAR AGO	SHARE
The Hershey Co.	\$644.6	-1.0%	53.9%
Mars	450.5	-6.5	37.7
Nestle USA	97.1	-6.9	8.1
Tootsie Roll Industries		1.8	0.9
Just Born	1.0	-35.9	0.2

The stat pool: the grocery headquarters annual State of the Industry Almanac takes a comprehensive look at dozens of supermarket categories; STATE OF THE INDUST....

TOP VENDORS	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	AVG. PRICE PER UNIT
The Hershey Co.	300.9	-2.8%	\$2.14
Mars	210.9	-7.6	2.14
Nestle USA	32.4	-7.1	2.99
Tootsie Roll Industries	0.7	3.3	2.51
Just Born	0.3	-33.8	2.95

TOP BRANDS	\$/SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE
Reeses	\$174.0	-2.5%	14.5%
Snickers	164.7	-6.4	13.8
Kit Kat	140.4	-1.8	11.7
All Hershey's products	115.2	6.3	9.6
Hershey's	94.3	4.1	7.9
Milky Way	71.4	-10.8	6.0
M & M'S	68.8	-7.3	5.8
Twix	60.2	-2.3	5.0
Peter Paul Almond Joy	50.9	-7.7	4.3
Three Musketeers	47.2	-5.2	3.9
CATEGORY TOTAL	1,196.3	-3.6	100.0

TOP BRANDS	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	AVG. PRICE PER UNIT
Reeses	94.2	-3.9%	\$1.85
Snickers	76.6	-6.6	2.15
Kit Kat	70.1	-3.4	2.00
All Hershey's products	13.5	5.3	8.52
Hershey's	55.5	6.1	1.70
Milky Way	38.0	-14.4	1.88
M & M'S	34.6	-7.5	1.99
Twix	33.3	-3.2	1.81
Peter Paul Almond Joy	28.1	-8.1	1.81
Three Musketeers	23.3	-6.3	2.02
CATEGORY TOTAL	545.8	-5.0	2.19

TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25.

Source: IRI

CHOCOLATE CANDY BOX/BAG/BAR < 3.5 OUNCES

Mars edged out Hershey for most brands in the top 10, S to 4. However, Hershey products outsold Mars', capturing 43.8% of dollars versus 34.7%. Nestle Butterfinger was the only non Hershey or Mars brand in the top 10, placing 8th, up almost 40%.

TOP VENDORS	\$/SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE
The Hershey Co.	\$796.5	-0.7%	43.8%

The stat pool: the grocery headquarters annual State of the Industry Almanac takes a comprehensive look at dozens of supermarket categories; STATE OF THE INDUST....

Mars	631.3	-1.7	34.7
Nestle USA	108.4	-2.5	6.0
Lindt & Sprungli A.G.	31.1	73.0	1.7
Russell Stover Candies	26.7	-9.9	1.5

UNIT SALES CHANGE VS. AVG. PRICE
TOP VENDORS (MILLIONS) YEAR AGO PER UNIT

The Hershey Co.	860.7	-3.9%	\$0.93
Mars	680.8	-4.3	0.93
Nestle USA	131.7	-12.9	0.82
Lindt & Sprungli A.G.	39.5	54.2	0.79
Russell Stover Candies	28.6	-2.0	0.93

\$ SALES CHANGE VS.
TOP BRANDS (MILLIONS) YEAR AGO SHARE

M & M'S	\$234.4	0.3%	12.9%
Reeses	192.5	-0.7	10.6
Snickers	182.7	-4.8	10.0
Hershey's	157.0	-0.1	8.6
Kit Kat	145.6	-1.3	8.0
Hershey's Cookies 'n' Creme		50.9	4.4
Twix	46.6	14.6	2.6
Nestle Butterfinger	46.1	39.9	2.5
Three Musketeers	42.1	-1.5	2.3
Milky Way	39.0	-8.9	2.1

CATEGORY TOTAL 1,818.7 0.8 100.0

UNIT SALES CHANGE VS. AVG. PRICE
TOP BRANDS (MILLIONS) YEAR AGO PER UNIT

M & M'S	248.2	-1.4%	\$0.94
Reeses	187.6	-3.2	1.03
Snickers	205.0	-6.7	0.89
Hershey's	178.8	-3.0	0.88
Kit Kat	152.5	-5.4	0.95
Hershey's Cookies 'n' Creme		63.5	1.9
Twix	54.5	2.1	0.85
Nestle Butterfinger	54.7	17.7	0.84
Three Musketeers	45.6	-6.8	0.92
Milky Way	44.7	-10.4	0.87

CATEGORY TOTAL 1,902.7 -3.2 0.96

TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25.

Source: IRI

CHOCOLATE CANDY BOX/BAG/BAR > 3.5 OUNCES

With sales of more than \$4.6 billion, up 3.4%, the category shows no signs of slowing. M & M'S are still clearly the top brand at 12.5% dollar share. However, brands two through 10 are separated by less than 4%. Hershey held onto the top vendor spot with 38.6% of dollars, followed by Mars at 27.5%.

The stat pool: the grocery headquarters annual State of the Industry Almanac takes a comprehensive look at dozens of supermarket categories; STATE OF THE INDUST....

TOP VENDORS	\$ SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE
The Hershey Co.	\$1,791.6	0.2%	38.6%
Mars	1,274.5	2.5	27.5
Nestle USA	293.5	-7.5	6.3
Lindt & Sprungli A.G.	265.5	10.0	5.7
Ghirardelli Chocolate Co.	190.0	14.7	4.1

TOP VENDORS	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	AVG. PRICE PER UNIT
The Hershey Co.	577.0	-2.4%	\$3.10
Mars	297.1	6.0	4.29
Nestle USA	133.9	-10.2	2.19
Lindt & Sprungli A.G.	83.0	8.4	3.20
Ghirardelli Chocolate Co.	58.9	14.2	3.23

TOP BRANDS	\$ SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE
M & M'S	\$580.7	-4.5%	12.5%
Hershey's	322.3	2.0	6.9
Reeses	240.3	-2.7	5.2
All Hershey's products	202.9	8.2	4.4
Hershey's Kisses	184.7	1.3	4.0
All Mars Products	158.1	4.6	3.4
Lindt Lindor	147.5	11.1	3.2
Brookside	144.0	28.9	3.1
Snickers	139.8	-6.3	3.0
Private label	139.6	8.7	3.0
CATEGORY TOTAL	4,643.0	3.4	100.0

TOP BRANDS	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	AVG. PRICE PER UNIT
M & M'S	130.9	-3.9%	\$4.44
Hershey's	114.7	-1.2	2.81
Reeses	56.4	-4.2	4.26
All Hershey's products	29.2	5.9	6.95
Hershey's Kisses	43.7	-2.5	4.22
All Mars Products	21.6	7.5	7.31
Lindt Lindor	38.6	10.7	3.82
Brookside	31.0	29.6	4.64
Snickers	25.6	-6.3	5.46
Private label	52.7	0.4	2.65
CATEGORY TOTAL	1,443.3	1.1	3.22

TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25.

Source: IRI

SUGAR-FREE CHOCOLATE CANDY

Consumers may be looking to eat healthy, but not when it comes to candy. Sugar-free candy

The stat pool: the grocery headquarters annual State of the Industry Almanac takes a comprehensive look at dozens of supermarket categories; STATE OF THE INDUST....

sales were down 6% in both dollars and units. Atkins Nutritionals made its entry with its higher priced Endulge brand. With an average price of \$ 10.24 Endulge was the 7th best selling brand with \$1.1 million in sales.

TOP VENDORS	\$ SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE
Russell Stover Candies	\$86.3	-6.1%	71.3%
The Hershey Co.	21.0	-7.7	17.3
Whitman's Chocolates	6.7	-11.8	5.5
Atkins Nutritionals	1.1	NA	0.9
DeMet's Candy Co.	0.9	-54.7	0.7

TOP VENDORS	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	AVG. PRICE PER UNIT
Russell Stover Candies	45.8	-5.8%	\$1.88
The Hershey Co.	8.5	-8.5	2.46
Whitman's Chocolates	1.5	-16.6	4.56
Atkins Nutritionals	0.1	NA	10.24
DeMet's Candy Co.	0.4	-47.8	2.34

TOP BRANDS	\$ SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE
Russell Stover	\$86.3	-6.0%	71.2%
Reeses	6.9	-10.9	5.7
Whitman's Sampler	5.8	-8.3	4.8
Hershey's	5.8	-13.0	4.8
Hershey's Special Dark	5.2	-6.5	4.3
York	3.1	12.0	2.5
Atkins Endulge	1.1	NA	0.9
DeMet's Turtles	0.9	-54.4	0.7
Whitman's	0.8	-30.0	0.7
Lily's	0.8	43.1	0.7
CATEGORY TOTAL	121.1	-6.0	100.0

TOP BRANDS	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	AVG. PRICE PER UNIT
Russell Stover	45.8	-5.7%	\$1.88
Reeses	2.4	-11.8	2.85
Whitman's Sampler	1.0	-10.7	5.85
Hershey's	2.5	-9.6	2.34
Hershey's Special Dark	2.3	-10.6	2.27
York	1.3	5.6	2.31
Atkins Endulge	0.1	NA	10.24
DeMet's Turtles	0.4	-47.1	2.34
Whitman's	0.5	-26.8	1.80
Lily's	0.2	34.8	3.86
CATEGORY TOTAL	58.2	-6.0	2.08

TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25.

Source: IRI

The stat pool: the grocery headquarters annual State of the Industry Almanac takes a comprehensive look at dozens of supermarket categories; STATE OF THE INDUST....

HARD SUGAR CANDY/PKG & ROLL CANDY

A good year from Jolly Rancher (up 7.3% in dollars) took the top spot from Werther's (down 2.5%). On the vendor side, sales were pretty well dispersed. Top Vendor Hershey's captured 19.9% of dollars, while No. 5, private label, was at a respectable 8.7%.

TOP VENDORS	\$ SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE
The Hershey Co.	\$98.8	-3.0%	19.9%
Storck USA	83.3	-2.5	16.8
Tootsie Roll Industries	58.5	0.0	11.8
Spangler Candy Co.	53.3	2.4	10.7
Private label	43.3	3.0	8.7

TOP VENDORS	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	AVG. PRICE PER UNIT
The Hershey Co.	43.0	-4.8%	\$2.30
Storck USA	41.1	-3.1	2.02
Tootsie Roll Industries	25.9	0.2	2.26
Spangler Candy Co.	14.3	3.9	3.71
Private label	37.5	0.1	1.15

TOP BRANDS	\$ SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE
Jolly Rancher	\$86.4	7.3%	17.4%
Werther's Original	83.3	-2.5	16.8
Private label	43.3	3.0	8.7
Spangler Dum Dum Pops	41.0	4.1	8.3
Charms Blow Pop	31.6	-8.3	6.4
Tootsie Roll Pops	28.4	-5.0	5.7
Lifesavers	28.4	0.9	5.7
Nips	19.3	-9.7	3.9
Original Gourmet	17.3	8.5	3.5
Tootsie Pops	13.3	-6.4	2.7
CATEGORY TOTAL	497.0	-2.2	100.0

TOP BRANDS	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	AVG. PRICE PER UNIT
Jolly Rancher	35.6	13.1%	\$2.42
Werther's Original	41.1	-3.1	2.02
Private label	37.5	0.1	1.15
Spangler Dum Dum Pops	10.0	4.2	4.08
Charms Blow Pop	21.5	-8.2	1.47
Tootsie Roll Pops	12.5	-6.5	2.26
Lifesavers	13.4	-1.4	2.11
Nips	17.3	-14.1	1.11
Original Gourmet	34.9	9.7	0.50
Tootsie Pops	2.6	-8.0	5.10
CATEGORY TOTAL	309.0	-2.5	1.61

TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET

The stat pool: the grocery headquarters annual State of the Industry Almanac takes a comprehensive look at dozens of supermarket categories; STATE OF THE INDUST....

RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS
FOR THE 52 WEEKS ENDED JANUARY 25.

Source: IRI

NON CHOCOLATE CHEWY CANDY

Candy sales are clearly more than just chocolate as this category was up a solid 6.3% in dollars, 4.5% in units. Skittles and Starburst were best-selling national brands with dollar shares of 9.1% and 8.2% respectively, trailing private label (10.7%). Wrigley was the top vendor with 26.3% of all dollars.

TOP VENDORS	\$ SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE
William Wrigley Jr. Co.	\$498.2	5.1%	26.3%
Mondelez International	215.9	13.4	11.4
Private label	202.6	-6.8	10.7
Ferrara Candy Co.	133.7	5.6	7.1
The Hershey Co.	133.7	20.8	7.1

TOP VENDORS	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	AVG. PRICE PER UNIT
William Wrigley Jr. Co.	249.7	3.0%	\$2.00
Mondelez International	120.9	14.9	1.79
Private label	164.4	-7.7	1.23
Ferrara Candy Co.	84.1	3.1	1.59
The Hershey Co.	64.4	6.4	2.08

TOP BRANDS	\$ SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE
Private label	\$202.6	-6.8%	10.7%
Skittles	172.1	13.0	9.1
Starburst	155.0	17.7	8.2
Sour Patch Kids	94.2	8.2	5.0
Swedish Fish	68.3	2.9	3.6
Haribo Gold Bears	61.2	9.3	3.2
Jolly Rancher	59.2	-10.9	3.1
Lifesavers Gummies	53.4	-3.5	2.8
Skittles & Starburst	48.7	-2.2	2.6
Air Heads	47.7	17.9	2.5
CATEGORY TOTAL	1,895.4	6.3	100.0

TOP BRANDS	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	AVG. PRICE PER UNIT
Private label	164.4	-7.7%	\$1.23
Skittles	98.7	14.6	1.74
Starburst	79.9	13.6	1.94
Sour Patch Kids	53.4	5.5	1.76
Swedish Fish	33.5	1.6	2.04
Haribo Gold Bears	41.6	14.0	1.47
Jolly Rancher	34.6	-10.3	1.71
Lifesavers Gummies	29.9	-1.2	1.78
Skittles & Starburst	5.4	-14.6	8.87

The stat pool: the grocery headquarters annual State of the Industry Almanac takes a comprehensive look at dozens of supermarket categories; STATE OF THE INDUST....

Air Heads	38.9	18.7	1.23
CATEGORY TOTAL	1,182.0	4.5	1.60

TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25.

Source: IRI

GROUND COFFEE

Top brand Folgers had almost double the dollar share of its closest competitor, Maxwell House (31% to 15.7%). Of the top 10 brands, only Peet's had any significant growth, up 4.9%. Overall, the category was down almost 3% in dollars and 3.5% in units. Sales approached \$4 billion.

TOP VENDORS	\$ SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE
The Folger Coffee Co.	\$1,273.3	-5.5%	31.9%
Kraft Foods Group	792.4	-3.2	19.9
Private label	372.8	-4.7	9.3
Starbucks Coffee Co.	346.1	0.3	8.7
The J. M. Smucker Co.	319.7	-1.1	8.0

TOP VENDORS	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	AVG. PRICE PER UNIT
The Folger Coffee Co.	180.1	-6.8%	\$7.07
Kraft Foods Group	131.9	-4.5	6.01
Private label	70.9	-3.7	5.26
Starbucks Coffee Co.	41.6	0.8	8.31
The J. M. Smucker Co.	37.5	-2.0	8.54

TOP BRANDS	\$ SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE
Folgers	\$1,235.0	-5.3%	31.0%
Maxwell House	625.9	-5.5	15.7
Private label	372.8	-4.7	9.3
Starbucks	334.0	0.6	8.4
Dunkin' Donuts	305.1	0.7	7.7
Gevalia	103.8	10.0	2.6
Peet's Coffee	91.3	4.9	2.3
Community	86.2	1.3	2.2
Eight O' Clock	80.6	-9.2	2.0
Chock full o' Nuts	71.3	-2.3	1.8

CATEGORY TOTAL 3,988.2 -2.9 100.0

TOP BRANDS	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	AVG. PRICE PER UNIT
Folgers	173.2	-6.7%	\$7.13
Maxwell House	106.6	-7.0	5.87
Private label	70.9	-3.7	5.26
Starbucks	40.1	1.2	8.33

The stat pool: the grocery headquarters annual State of the Industry Almanac takes a comprehensive look at dozens of supermarket categories; STATE OF THE INDUST....

Dunkin' Donuts	35.5	3.3	8.60
Gevalia	16.2	11.8	6.42
Peet's Coffee	10.3	4.2	8.83
Community	12.2	-1.4	7.06
Eight O' Clock	14.7	-6.8	5.49
Chock full o' Nuts	15.4	-5.0	4.63
CATEGORY TOTAL	626.4	-3.5	6.37

TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25.

Source: IRI

GROUND DECAFFEINATED COFFEE

There was little buzz surrounding decaffeinated coffee. Dollars dipped 6.7% while units were down 7%. Eight O' Clock entered the top 10 with an increase of 37.4% in dollars eclipsing the \$5 million mark. Gevalia was the only brand in the top 10 to improve dollar sales, up 9.7%.

TOP VENDORS	\$ SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE
The Folger Coffee Co.	\$94.8	-8.4%	29.8%
Private label	63.1	-8.6	19.8
Kraft Foods Group	35.7	-5.1	11.2
The J.M. Smucker Co.	30.5	-7.8	9.6
Starbucks Coffee Co.	26.2	-1.7	8.2

TOP VENDORS	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	AVG. PRICE PER UNIT
The Folger Coffee Co.	12.5	-10.3%	\$7.61
Private label	11.6	-8.6	5.46
Kraft Foods Group	5.8	-4.1	6.19
The J.M. Smucker Co.	4.0	-11.0	7.60
Starbucks Coffee Co.	3.4	0.0	7.73

TOP BRANDS	\$ SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE
Folgers	\$87.4	-8.5%	27.4%
Private label	63.1	-8.6	19.8
Dunkin' Donuts	27.2	-2.9	8.5
Starbucks	26.2	-1.7	8.2
Maxwell House	21.5	-11.9	6.7
Peet's Coffee	14.1	-1.5	4.4
Gevalia	12.5	9.7	3.9
New England	8.9	-5.8	2.8
Folgers Simply Smooth	6.9	-8.8	2.2
Eight O' Clock	5.1	37.4	1.6
CATEGORY TOTAL	318.5	-6.7	100.0

TOP BRANDS	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	AVG. PRICE PER UNIT
Folgers	\$87.4	-8.5%	27.4%

The stat pool: the grocery headquarters annual State of the Industry Almanac takes a comprehensive look at dozens of supermarket categories; STATE OF THE INDUST....

Folgers	11.1	-10.8%	\$7.90
Private label	11.6	-8.6	5.46
Dunkin' Donuts	3.6	-0.8	7.58
Starbucks	3.4	0.0	7.73
Maxw'ell House	3.5	-10.7	6.14
Peet's Coffee	1.6	-1.2	8.78
Gevalia	1.9	12.4	6.48
New England	1.8	-0.9	5.07
Folgers Simply Smooth	1.3	-8.0	5.36
Eight O' Clock	0.9	42.9	5.85
CATEGORY TOTAL	48.5	-7.0	6.56

TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25.

Source: IRI

SINGLE CUP COFFEE

The single cup phenomenon is still percolating. Dollar and unit growth is still in the double-digits, 23% and 28.8% respectively, as sales have pushed past \$3 billion. The top vendor is Keurig Green Mountain (44%) but others enjoyed greater growth, including Starbucks (27.3%) and Kraft (51.7%). Private label was also up significantly, 74%.

\$ SALES	CHANGE VS.	TOP VENDORS (MILLIONS)	YEAR AGO	SHARE
Keurig Green Mountain	\$1,391.7		10.8%	44.0%
Starbucks Coffee Co.	450.5		27.6	14.2
The Folger Coffee Co.	357.4		3.2	11.3
Private label	339.2	74.0	10.7	
Kraft Foods Group	277.5		51.7	8.8

UNIT SALES	CHANGE VS.	TOP VENDORS (MILLIONS)	YEAR AGO	AVG. PRICE PER UNIT
Keurig Green Mountain	142.8		15.2%	\$9.75
Starbucks Coffee Co.	45.6		34.7	9.87
The Folger Coffee Co.	40.18.4		8.91	
Private label	43.3	66.8	7.84	
Kraft Foods Group	34.6		50.0	8.02

\$ SALES	CHANGE VS.	TOP BRANDS (MILLIONS)	YEAR AGO	SHARE
Keurig Green Mountain Coffee		\$494.2		4.5% 15.6%
Starbucks	448.7	27.3	14.2	
Private label	339.2	74.0	10.7	
Folgers Gourmet Selections	331.2		4.5	10.5
Keurig Eight O' Clock	167.8		40.5	5.3
Gevalia	131.9	64.5	4.2	
Keurig Donut House Collection		129.9	-18.6	4.1
Keurig New man's Own Organics		104.5	-10.7	3.3
Maxwell House Cafe Collection		103.7	31.9	3.3
Keurig Donut shop coffee	90.2	17,319.3	0.8	

The stat pool: the grocery headquarters annual State of the Industry Almanac takes a comprehensive look at dozens of supermarket categories; STATE OF THE INDUST....

CATEGORY TOTAL	3,164.8	23.0	100.0
UNIT SALES CHANGE VS. AVG. PRICE			
TOP BRANDS (MILLIONS)	YEAR AGO	PER UNIT	
Keurig Green Mountain Coffee	52.36.0%	\$9.46	
Starbucks	45.5	34.4	9.86
Private label	43.3	66.8	7.84
Folgers Gourmet Selections	35.4	11.9	9.35
Keurig Eight O' Clock	22.8	43.7	7.35
Gevalia	17.2	68.3	7.66
Keurig Donut House Collection	15.89.2	8.23	
Keurig New man's Own Orgnics	7.0	-4.6	14.94
Maxwell House Cafe Collection	11.8	23.3	8.78
Keurig Donut shop coffee	5.6	24,029.0	16.19
CATEGORY TOTAL	348.0	28.8	9.09

TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25.

Source: IRI

DRY CAT FOOD

With four of the top 10 brands, Nestle Purina captured more than 55% of dollars in the dry cat food category. There was no clear brand leader as the top three (Purina Kit & Kaboodle, private label and Meow Mix Original Choice) were separated by just 0.8%. Overall, the category accounted for more than \$2.3 billion, down 1.5%.

\$ SALES	CHANGE VS.			
TOP VENDORS (MILLIONS)	YEAR AGO	SHARE		
Nestle Purina PetCare Co.	\$1,282.8	0.5%	55.3%	
Big Heart Pet Brands	559.7	0.4	24.1	
Private label	197.4	-9.6	8.5	
Procter & Gamble	185.2	-9.6	8.0	
Mars	31.5	-27.1	1.4	

UNIT SALES	CHANGE VS.	AVG. PRICE		
TOP VENDORS (MILLIONS)	YEAR AGO	PER UNIT		
Nestle Purina PetCare Co.	164.0	-2.4%	\$7.82	
Big Heart Pet Brands	77.0	0.3	7.27	
Private label	35.6	-5.7	5.54	
Procter & Gamble	19.4	-10.0	9.57	
Mars	3.9	-42.7	8.09	

\$ SALES	CHANGE VS.			
TOP BRANDS (MILLIONS)	YEAR AGO	SHARE		
Purina Kit & Kaboodle	\$209.9	2.8%	9.1%	
Private label	197.4	-9.6	8.5	
Meow Mix Original Choice	192.6	29.0	8.3	
Iams ProActive Health	137.7	-7.5	5.9	
Purina Cat Chow Indoor	132.7	-8.7	5.7	
Meow Mix	100.2	-33.8	4.3	

The stat pool: the grocery headquarters annual State of the Industry Almanac takes a comprehensive look at dozens of supermarket categories; STATE OF THE INDUST....

Purina Cat Chow Complete	99.2	0.3	4.3
Meow Mix Tender Centers	85.8	19.2	3.7
Purina Cat Chow Naturals	85.1	27.7	3.7
9 Lives Daily Essentials	84.4	-4.0	3.6
 CATEGORY TOTAL	2,318.4	-1.5	100.0

TOP BRANDS	UNIT SALES	CHANGE VS.	AVG. PRICE	PER UNIT
	(MILLIONS)	YEAR AGO		
Purina Kit & Kaboodle	22.2	0.3%	\$9.45	
Private label	35.6	-5.7	5.54	
Meow Mix Original Choice	21.1	10.1	9.15	
Iams ProActive Health	14.1	-8.0	9.77	
Purina Cat Chow Indoor	16.5	-8.4	8.05	
Meow Mix 12.7	-21.9	7.89		
Purina Cat Chow Complete	12.4	-4.1	7.99	
Meow Mix Tender Centers	12.9	19.1	6.65	
Purina Cat Chow Naturals	11.2	20.8	7.62	
9 Lives Daily Essentials	10.7	-0.7	7.87	
 CATEGORY TOTAL	311.4	-3.3	7.45	

TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25.

Source: IRI

WET CAT FOOD

Nestle Purina is the cat's meow, with more than three quarters of category dollars, up 3.3%. All but two of the top 10 brands belong to the St. Louis-based vendor. Its fastest growing brand is Fancy Feast Gravy Lovers, up 33.4% in dollars. Overall category sales approached \$2 billion.

TOP VENDORS	\$/SALES	CHANGE VS.	YEAR AGO	SHARE
	(MILLIONS)			
Nestle Purina PetCare Co.	\$1,528.6	3.3%		76.8%
Big Heart Pet Brands	215.5	-8.5	10.8	
Private label	114.9	-6.3	5.8	
Mars	91.1	-9.2	4.6	
Procter & Gamble	25.4	92.9	1.3	

TOP VENDORS	UNIT SALES	CHANGE VS.	AVG. PRICE	PER UNIT
	(MILLIONS)	YEAR AGO		
Nestle Purina PetCare Co.	1,722.7	1.6%	\$0.89	
Big Heart Pet Brands	165.6	-11.1	1.30	
Private label	141.5	-13.4	0.81	
Mars	78.1	10.5	1.17	
Procter & Gamble	22.0	101.3	1.15	

TOP BRANDS	\$/SALES	CHANGE VS.	YEAR AGO	SHARE
	(MILLIONS)			
Fancy Feast	\$284.0	0.1%	14.3%	
Purina Friskies	241.0	-1.9	12.1	

The stat pool: the grocery headquarters annual State of the Industry Almanac takes a comprehensive look at dozens of supermarket categories; STATE OF THE INDUST....

Friskies	216.5	-0.5	10.9	
Purina Fancy Feast	174.6	-2.4	8.8	
Private label	114.9	-6.3	5.8	
9 Lives	102.9	-6.9	5.2	
Fancy Feast Elegant Medleys		92.1	-3.1	4.6
Fancy Feast Gravy Lovers	83.9	33.4	4.2	
Friskies Tasty Treasures	73.0	-4.7	3.7	
Friskies Prime Filets	55.0	-8.6	2.8	
CATEGORY TOTAL	1,991.0	1.3	100.0	

TOP BRANDS	UNIT SALES	CHANGE VS.	AVG. PRICE	
	(MILLIONS)	YEAR AGO	PER UNIT	
Fancy Feast	472.8	0.6%	\$0.60	
Purina Friskies	433.3	-1.9	0.56	
Friskies	84.4	-3.2	2.56	
Purina Fancy Feast	51.1	-3.8	3.42	
Private label	141.5	-13.4	0.81	
9 Lives	89.9	-7.5	1.14	
Fancy Feast Elegant Medleys	62.7	-8.2	1.47	
Fancy Feast Gravy Lovers	98.2	37.4	0.85	
Friskies Tasty Treasures	98.4	-13.7	0.74	
Friskies Prime Filets	67.0	-2.6	0.82	
CATEGORY TOTAL	2,148.5	-0.8	0.93	

TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25.

Source: IRI

DRY DOG FOOD

Category leader Nestle Purina had five of the top 10 brands and was the only vendor not to suffer a decrease in sales. The biggest brand gainer was Rachael Ray Nutrish, up 30.1%, good enough for 2.2% of category dollars. Overall, category dollars dipped below \$5.2 billion a 2.8% decrease. Units were down 3.4%.

TOP VENDORS (MILLIONS)	\$ SALES	CHANGE VS.	YEAR AGO	SHARE
Nestle Purina PetCare Co.		\$2,401.3	0.2%	46.2%
Private label	833.5	-9.6	16.0	
Mars	658.4	-3.7	12.7	
Procter & Gamble	531.2	-8.7	10.2	
Big Heart Pet Brands	460.4	-4.5	8.9	

TOP VENDORS (MILLIONS)	UNIT SALES	CHANGE VS.	AVG. PRICE	
			YEAR AGO	PER UNIT
Nestle Purina PetCare Co.		179.1	0.3%	\$13.41
Private label	67.7	-12.6	12.31	
Mars	50.5	-2.9	13.03	
Procter & Gamble	31.1	-10.9	17.06	
Big Heart Pet Brands	50.9	-1.1	9.04	

The stat pool: the grocery headquarters annual State of the Industry Almanac takes a comprehensive look at dozens of supermarket categories; STATE OF THE INDUST....

\$ SALES		CHANGE VS.		
TOP BRANDS	(MILLIONS)	YEAR AGO	SHARE	
Private label	\$833.5	-9.6%	16.0%	
Purina Dog Chow	536.5	3.3	10.3	
Pedigree	459.4	-3.7	8.8	
Purina One Smart Blend	314.4	2.1	6.0	
Iams ProActive Health	276.9	-10.2	5.3	
Purina Beneful	253.1	4.5	4.9	
Kibbles 'n Bits	226.0	-11.7	4.3	
Purina Beneful Healthy Weight		209.3	-4.3	4.0
Purina Alpo Prime Cuts	117.1	-0.1	2.3	
Rachael Ray Nutrish	113.0	30.1	2.2	
CATEGORY TOTAL	5,199.3	-2.8	100.0	

UNIT SALES		CHANGE VS.	AVG. PRICE	
TOP BRANDS	(MILLIONS)	YEAR AGO	PER UNIT	
Private label	67.7	-12.6%	\$12.31	
Purina Dog Chow	33.1	2.5	16.22	
Pedigree	31.4	-2.9	14.61	
Purina One Smart Blend	16.1	0.3	19.48	
Iams ProActive Health	15.7	-8.2	17.63	
Purina Beneful	19.2	4.9	13.20	
Kibbles 'n Bits	25.0	-8.6	9.04	
Purina Beneful Healthy Weight		16.2	4.6	12.93
Purina Alpo Prime Cuts	12.3	6.5	9.51	
Rachael Ray Nutrish	7.8	23.8	14.49	
CATEGORY TOTAL	406.2	-3.4	12.80	

TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25.

Source: IRI

WET DOG FOOD

The top two brands had strong years. Cesar Canine Cuisine was up 11.2% in dollars for a 14.6% market share and Pedigree Wet was up 8.9% for a 13.9% market share. The best growing were Purina Alpo Chop House (up 36.1%) and Purina Mighty Dog (up 34%). Category sales went past \$1.4 billion.

\$ SALES		CHANGE VS.		
TOP VENDORS	(MILLIONS)	YEAR AGO	SHARE	
Mars	\$668.1	3.8%	47.5%	
Nestle Purina PetCare Co.	479.3	1.9	34.1	
Private label	132.5	-12.5	9.4	
Big Heart Pet Brands	53.4	-3.2	3.8	
Procter & Gamble	29.4	8.4	2.1	

UNIT SALES		CHANGE VS.	AVG. PRICE	
TOP VENDORS	(MILLIONS)	YEAR AGO	PER UNIT	
Mars	500.7	0.0%	\$1.33	

The stat pool: the grocery headquarters annual State of the Industry Almanac takes a comprehensive look at dozens of supermarket categories; STATE OF THE INDUST....

Nestle Purina PetCare Co.	348.6	0.2	1.37
Private label	114.6	-19.4	1.16
Big Heart Pet Brands	81.7	1.8	0.65
Procter & Gamble	15.5	5.6	1.90
\$ SALES CHANGE VS.			
TOP BRANDS (MILLIONS)	YEAR AGO	SHARE	
Cesar Canine Cuisine	\$204.8	11.2%	14.6%
Pedigree	195.3	8.9	13.9
Private label	132.5	-12.5	9.4
Pedigree Choice Cuts	97.4	-8.4	6.9
Purina Alpo Prime Cuts	92.2	-5.6	6.6
Purina Beneful Prepared Meals	80.5	-2.3	5.7
Purina Mighty Dog	67.4	34.0	4.8
Pedigree Little Champions	66.0	-9.5	4.7
Purina Alpo Chop House	50.2	36.1	3.6
Cesar Savory Delights	38.4	8.4	2.7
CATEGORY TOTAL	1,405.2	1.1	100.0
UNIT SALES CHANGE VS. AVG. PRICE			
TOP BRANDS (MILLIONS)	YEAR AGO	PER UNIT	
Cesar Canine Cuisine	159.2	-3.0%	\$1.29
Pedigree	149.7	2.8	1.30
Private label	114.6	-19.4	1.16
Pedigree Choice Cuts	62.4	-1.4	1.56
Purina Alpo Prime Cuts	76.1	3.4	1.21
Purina Beneful Prepared Meals	40.7	-3.0	1.98
Purina Mighty Dog	46.9	-11.1	1.44
Pedigree Little Champions	20.6	-15.8	3.20
Purina Alpo Chop House	54.7	29.6	0.92
Cesar Savory Delights	40.9	5.2	0.94
CATEGORY TOTAL	1,083.7	-2.3	1.30

TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25.

Source: IRI

CAT SNACKS/BEVERAGES

Mars increased its stronghold on the category, up 13.1% in dollars for a 61.4% market share. Mars'Whiskas Temptations was the top selling brand with a 40.6% dollar share. Overall, category dollars were up 7.4%, though down in units, 3.9%, due to an average price increase of 2 3-cents.

\$ SALES	CHANGE VS.		
TOP VENDORS (MILLIONS)	YEAR AGO	SHARE	
Mars	\$274.1	13.1%	61.4%
Nestle Purina PetCare Co.	143.5	-2.4	32.2
Big Heart Pet Brands	12.5	-17.0	2.8
Hartz Mountain Corp.	5.7	963.7	1.3
Worldwise	4.7	-5.6	1.0

The stat pool: the grocery headquarters annual State of the Industry Almanac takes a comprehensive look at dozens of supermarket categories; STATE OF THE INDUST....

UNIT SALES CHANGE VS. AVG. PRICE
TOP VENDORS (MILLIONS) YEAR AGO PER UNIT

Mars	118.20.1%	\$2.32	
Nestle Purina PetCare Co.	71.1	-13.1	2.02
Big Heart Pet Brands	10.1	-15.0	1.24
Hartz Mountain Corp.	4.3	2,031.4	1.32
Worldwise	1.3	-9.5	3.65

\$ SALES CHANGE VS.
TOP BRANDS (MILLIONS) YEAR AGO SHARE

Whiskas Temptations	\$181.3	10.2%	40.6%
Whiskas Temptations Mixllps	52.6	18.9	11.8
Friskies Party Mix	44.6	-21.9	10.0
Purina Whskr Lckn's Crnch Lvrs	14.6	-12.7	3.3
Friskies Party Mx Bchsd Crnch	13.9	2.5	3.1
Purina Whskr Lckn's Tndr Mmnts	11.9	-17.1	2.7
Friskies Party Mix Orgnl Crnch	11.8	0.2	2.6
Whiskas Temptations Tumblers	9.2	NA	2.1
Whiskas Temptations Chzy Mddls	8.7	44.1	2.0
Purina Whisker Lickin's	7.5	1.7	1.7

CATEGORY TOTAL 446.2 7.4 100.0

UNIT SALES CHANGE VS. AVG. PRICE
TOP BRANDS (MILLIONS) YEAR AGO PER UNIT

Whiskas Temptations	72.1	-3.9%	\$2.52
Whiskas Temptations Mixllps	23.1	-1.7	2.27
Friskies Party Mix	22.5	-27.2	1.98
Purina Whskr Lckn's Crnch Lvrs	9.8	-11.7	1.49
Friskies Party Mx Bchsd Crnch	6.6	-10.1	2.10
Purina Whskr Lckn's Tndr Mmnts	10.0	-17.2	1.20
Friskies Party Mix Orgnl Crnch	3.2	-1.8	3.69
Whiskas Temptations Tumblers	4.4	NA	2.10
Whiskas Temptations Chzy Mddls	5.4	37.0	1.63
Purina Whisker Lickin's	2.5	-3.9	2.98

CATEGORY TOTAL 208.2 -3.9 2.14

TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25.

Source: IRI

DOG BISCUITS/TREATS/BEVERAGES

The category was up in both dollars (6.5%) and units (1.6%). Milk-Bone was the top selling national brand with 10.3% of dollars, 2% more than No. 2 Purina Beggin' Strips. The biggest brand gainer was Milo's Kitchen (up 25.5%) from top vendor Big Heart Pet Brands.

\$ SALES CHANGE VS.
TOP VENDORS (MILLIONS) YEAR AGO SHARE

Big Heart Pet Brands	\$814.6	10.0%	37.7%
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The stat pool: the grocery headquarters annual State of the Industry Almanac takes a comprehensive look at dozens of supermarket categories; STATE OF THE INDUST....

Nestle Purina PetCare Co.	436.1	0.0	20.2
Mars	239.2	4.3	11.1
Private label	224.5	-4.3	10.4
Waggin Train	54.1	17,358.3	2.5

TOP VENDORS	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	AVG. PRICE PER UNIT
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Big Heart Pet Brands	218.4	5.5%	\$3.73
Nestle Purina PetCare Co.	98.9	2.7	4.41
Mars	44.9	-1.3	5.32
Private label	67.8	-10.7	3.31
Waggin Train	5.1	7,469.3	10.54

TOP BRANDS	.\$ SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE
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Private label	\$224.5	-4.3%	10.4%	
Milk-Bone	222.3	2.7	10.3	
Purina Beggin' Strips		179.7	-7.9	8.3
Pup-Peroni	170.3		7.3	7.9
Pedigree Dentastix	146.0		9.5	6.8
Canine Carry Outs	117.5		8.2	5.4
Purina Busy Bone	71.0		1.7	3.3
Milos Kitchen	59.3		25.5	2.7
Milk-Bone Flavor Snacks		58.0	0.5	2.7
Purina Waggin Train	54.1	NA	2.5	

CATEGORY TOTAL	2,160.3	6.5	100.0
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TOP BRANDS	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	AVG. PRICE PER UNIT
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Private label	67.8	-10.7%	\$3.31	
Milk-Bone	48.7	0.7	4.57	
Purina Beggin' Strips		30.6	-11.7	5.88
Pup-Peroni	25.4	7.9	6.70	
Pedigree Dentastix	24.2	25.7	6.03	
Canine Carry Outs	74.0	7.6	1.59	
Purina Busy Bone	16.7	1.8	4.25	
Milos Kitchen	7.6	8.3	7.83	
Milk-Bone Flavor Snacks		12.4	1.6	4.67
Purina Waggin Train	5.1	NA	10.54	

CATEGORY TOTAL	511.1	11.6	4.23
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TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25.

Source: IRI

BABY FORMULA--POWDER

Mead Johnson overtook Abbot Nutrition as the top selling vendor off of its 13.6% dollar growth, compared to Abbot's 6.3% increase. However Abbot grabbed the top spot on the brand side with its Similac Advance product, beating out previous No. 1 Enfamil Premium, from Mead Johnson.

The stat pool: the grocery headquarters annual State of the Industry Almanac takes a comprehensive look at dozens of supermarket categories; STATE OF THE INDUST....

TOP VENDORS	\$ SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE
Mead Johnson Nutrition	\$1,496.2	13.6%	39.2%
Abbott Nutrition	1,404.7	6.3	36.8
Gerber Products Co.	630.6	-21.6	16.5
Private label	228.5	3.4	6.0
Nestle USA	32.4	0.8	

TOP VENDORS	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	AVG. PRICE PER UNIT
Mead Johnson Nutrition	73.8	14.0%	\$20.27
Abbott Nutrition	73.0	4.2	19.24
Gerber Products Co.	35.6	-25.0	17.72
Private label	12.9	-2.0	17.74
Nestle USA	1.9	7.8	17.49

TOP BRANDS	\$ SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE
Similac Advance	\$791.0	25.6%	20.7%
Enfamil Premium	602.0	8.6	15.8
Gerber Good Start Gentle	372.7	-25.0	9.8
Enfamil Gentlelease	359.2	23.9	9.4
Similac Sensitive	298.1	-30.7	7.8
Private label	228.5	3.4	6.0
Enfamil Nutramigen	141.7	11.3	3.7
Gerber Good Start Soothe	140.7	-2.6	3.7
Enfagrow Premium	130.0	10.9	3.4
Enfamil Prosobee	98.2	0.3	2.6
CATEGORY TOTAL	3,821.2	3.0	100.0

TOP BRANDS	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	AVG. PRICE PER UNIT
Similac Advance	43.9	26.6%	\$18.03
Enfamil Premium	32.0	9.6	18.80
Gerber Good Start Gentle	21.3	-28.4	17.54
Enfamil Gentlelease	17.4	25.2	20.63
Similac Sensitive	15.1	-35.9	19.80
Private label	12.9	-2.0	17.74
Enfamil Nutramigen	5.2	8.3	27.21
Gerber Good Start Soothe	7.8	-7.4	18.15
Enfagrow Premium	5.8	14.0	22.28
Enfamil Prosobee	5.1	-0.5	19.31
CATEGORY TOTAL	198.2	0.2	19.28

TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25.

Source: IRI

BABY FORMULA--RTD

Three of the top four brands were Similac products, accounting for nearly 60% of dollar sales. Enfamil Premium placed third with 16% of

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dollars. Overall, category dollars were flat while units were down 3.3%.

\$ SALES CHANGE VS.		YEAR AGO	SHARE
TOP VENDORS (MILLIONS)			
Abbott Nutrition	\$150.8	0.8%	68.3%
Mead Johnson Nutrition	62.6	2.9	28.3
Gerber Products Co.	6.9	-29.2	3.1
Private label	0.4	-25.4	0.2
Nestle Healthcare Nutrition	0.1	66.6	0.1

UNIT SALES CHANGE VS.		YEAR AGO	AVG. PRICE PER UNIT
TOP VENDORS (MILLIONS)			
Abbott Nutrition	17.1	-1.2%	\$8.83
Mead Johnson Nutrition	6.7	-2.8	9.37
Gerber Products Co.	1.0	-30.8	6.92
Private label	0.0	-37.7	9.00
Nestle Healthcare Nutrition	0.0	91.7	3.70

\$ SALES CHANGE VS.		YEAR AGO	SHARE
TOP BRANDS (MILLIONS)			
Similac Advance	\$68.5	-0.8%	31.0%
Similac Sensitive	40.9	1.2	18.5
Enfamil Premium	35.3	-4.6	16.0
Similac Expert Care Alimentuim		20.1	6.7
Enfamil Gentlelease	15.4	9.7	7.0
Similac	8.4	26.6	3.8
Similac Isomil	7.1	-16.4	3.2
Gerber Good Start Gentle	5.9	-29.9	2.7
Similac Expert Care Neosure	5.2	2.1	2.3
Enfamil Prosobee	3.4	13.7	1.6
CATEGORY TOTAL	220.9	0.1	100.0

UNIT SALES CHANGE VS.		YEAR AGO	AVG. PRICE PER UNIT
TOP BRANDS (MILLIONS)			
Similac Advance	7.7	0.1%	\$8.85
Similac Sensitive	4.5	-4.1	9.01
Enfamil Premium	4.0	-4.2	8.93
Similac Expert Care Alimentuim		2.0	2.3
Enfamil Gentlelease	1.4	-9.2	10.65
Similac	1.2	20.7	7.15
Similac Isomil	1.0	-19.7	7.31
Gerber Good Start Gentle	0.9	-31.7	6.96
Similac Expert Care Neosure	0.6	-2.7	8.43
Enfamil Prosobee	0.4	3.1	8.79
CATEGORY TOTAL	24.9	-3.3	8.89

TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25.

Source: IRI

BABY FORMULA--LIQUID CONCENTRATE

The stat pool: the grocery headquarters annual State of the Industry Almanac takes a comprehensive look at dozens of supermarket categories; STATE OF THE INDUST....

Liquid concentrate baby formula continues to falter as dollars were down almost 25%, after being down almost 20% the year prior. Unit sales were similarly off. Similac, Enfamil and Gerber are the main players in the category.

\$ SALES CHANGE VS.

TOP VENDORS (MILLIONS) YEAR AGO SHARE

Abbott Nutrition	\$33.9	-30.6%	40.9%
Mead Johnson Nutrition	30.7	-11.3	37.0
Gerber Products Co.	16.9	-32.4	20.4
Wellements Co. 0.9	-22.1	1.1	
Private label 0.5	19.6	0.6	

UNIT SALES CHANGE VS. AVG. PRICE

TOP VENDORS (MILLIONS) YEAR AGO PER UNIT

Abbott Nutrition	6.5	-29.5%	\$5.20
Mead Johnson Nutrition	5.6	-11.0	5.53
Gerber Products Co.	3.3	-33.8	5.07
Wellements Co. 0.1	-27.0	10.18	
Private label 0.1	18.5	9.90	

\$ SALES CHANGE VS.

TOP BRANDS (MILLIONS) YEAR AGO SHARE

Similac Advance	\$25.1	0.6%	30.2%
Enfamil Premium	21.8	-8.9	26.3
Gerber Good Start Gentle	12.6	-35.0	15.2
Similac Isomil 5.5	19.4	6.6	
Enfamil Prosobee	5.2	-13.6	6.3
Gerber Good Start Soy	4.3	-23.7	5.2
Enfamil Nutramigen Lipil	3.6	-20.3	4.4
Similac Sensitive	3.2	-83.0	3.9
Wellements Baby Move Constptn	0.9	-22.1	1.1
Private label 0.5	19.6	0.6	

CATEGORY TOTAL 83.0 -24.7 100.0

UNIT SALES CHANGE VS. AVG. PRICE

TOP BRANDS (MILLIONS) YEAR AGO PER UNIT

Similac Advance 4.8	0.9%	\$5.23
Enfamil Premium 4.1	-8.8	5.33
Gerber Good Start Gentle 2.5	-36.2	5.07
Similac Isomil 1.0	19.2	5.45
Enfamil Prosobee 1.0	-13.9	5.20
Gerber Good Start Soy 0.8	-25.4	5.08
Enfamil Nutramigen Lipil 0.4	-22.2	8.07
Similac Sensitive 0.7	-80.4	4.56
Wellements Baby Move Constptn 0.1	-27.0	10.18
Private label 0.1	18.5	9.90

CATEGORY TOTAL 15.6 -24.8 5.33

TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25.

Source: IRI

The stat pool: the grocery headquarters annual State of the Industry Almanac takes a comprehensive look at dozens of supermarket categories; STATE OF THE INDUST....

WHITE GRANULATED SUGAR

A 29-cent decrease in average price no doubt contributed to category dollars being down 11.7%, while units were only down 1.9%. Domino was the only national brand with double-digit dollar share (18.2%). Private label had a 54.6% market share, but also had the biggest dollar decrease, down 15.4%.

TOP VENDORS	\$ SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE
Private label	\$754.4	-15.4%	54.6%
Domino Foods	254.7	-10.5	18.4
C & H Sugar Co.	130.0	-13.9	9.4
Imperial Sugar Co.	95.5	-13.3	6.9
Cumberland Packing Corp.	40.6	6.2	2.9

TOP VENDORS	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	AVG. PRICE PER UNIT
Private label	309.6	-1.7%	\$2.44
Domino Foods	91.3	-2.5	2.79
C & H Sugar Co.	47.2	-7.6	2.75
Imperial Sugar Co.	36.5	-10.1	2.62
Cumberland Packing Corp.	11.4	1.8	3.55

TOP BRANDS	\$ SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE
Private label	\$754.4	-15.4%	54.6%
Domino	251.9	-10.5	18.2
C&H	130.0	-13.9	9.4
Dixie Crystals	49.7	-6.0	3.6
Sugar in the Raw	40.6	6.2	2.9
Imperial Sugar	36.4	-14.8	2.6
Crystal Sugar	30.3	80.2	2.2
Zulka	14.9	2.2	1.1
Florida Crystals	12.7	0.2	0.9
N joy	10.2	-5.4	0.7
CATEGORY TOTAL	1,381.3	-11.7	100.0

TOP BRANDS	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	AVG. PRICE PER UNIT
Private label	309.6	-1.7%	\$2.44
Domino	89.7	-2.5	2.81
C&H	47.2	-7.6	2.75
Dixie Crystals	18.7	-5.7	2.66
Sugar in the Raw	11.4	1.8	3.55
Imperial Sugar	12.8	-9.3	2.85
Crystal Sugar	7.2	57.2	4.19
Zulka	7.6	7.3	1.95
Florida Crystals	3.3	-0.5	3.77
N joy	1.1	-1.0	9.01
CATEGORY TOTAL	529.9	-1.9	2.61

The stat pool: the grocery headquarters annual State of the Industry Almanac takes a comprehensive look at dozens of supermarket categories; STATE OF THE INDUST....

TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25

Source: IRI

MARGARINE/SPREADS

With the No. 1 (Shedd's Country Crock) and No. 2 (I Can't Believe It's Not Butter) brands in the category, Unilever is the clear leader with 58.1% of dollars. Once again the category struggled, down more than 3% in dollars and more than 4% in units.

\$ SALES CHANGE VS.
TOP VENDORS (MILLIONS) YEAR AGO SHARE

Unilever Bestfoods N Amer	\$922.7	0.2%	58.1%
ConAgra Foods	289.0	-5.3	18.2
Boulder Brands	163.7	-15.1	10.3
Private label	82.5	-8.9	5.2
Land O' Lakes	42.5	-12.3	2.6

UNIT SALES CHANGE VS. AVG. PRICE
TOP VENDORS (MILLIONS) YEAR AGO PER UNIT

Unilever Bestfoods N Amer	357.0	0.3%	\$2.58
ConAgra Foods	194.2	-7.8	1.49
Boulder Brands	49.6	-17.3	3.30
Private label	50.3	-10.2	1.64
Land O' Lakes	20.0	-11.8	2.13

\$ SALES	CHANGE VS.			
TOP BRANDS (MILLIONS)	YEAR AGO	SHARE		
Shedd's Country Crock	\$404.9	3.9%	25.5%	
I Can't Believe It's Not Butter	258.9	-1.9	16.3	
Blue Bonnet	184.1	-3.2	11.6	
Smart Balance	160.0	-14.8	10.0	
Imperial	93.5	6.2	5.8	
Private label	82.5	-8.9	5.2	
I Can't Believe It's Not Butter	67.1	-7.6	4.2	
Lt				
Parkay	62.7	-8.8	3.9	
Brummel & Brown	41.0	-7.9	2.5	
Earth Balance	34.3	25.8	2.1	
CATEGORY TOTAL	1,587.8	-3.3	100.0	

UNIT SALES	CHANGE VS.	AVG. PRICE		
TOP BRANDS (MILLIONS)	YEAR AGO	PER UNIT		
Shedd's Country Crock	133.5	3.5%	\$3.03	
I Can't Believe It's Not Butter	77.9	-3.1	3.32	
Blue Bonnet	134.0	-8.0	1.37	
Smart Balance	48.1	-17.0	3.32	
Imperial	89.2	5.9	1.05	
Private label	50.3	-10.2	1.64	
I Can't Believe It's Not Butter	21.8	-9.7	3.07	
Lt				

The stat pool: the grocery headquarters annual State of the Industry Almanac takes a comprehensive look at dozens of supermarket categories; STATE OF THE INDUST....

Parkay	30.7	-10.0	2.04
Brummel & Brown	13.6	-8.9	3.02
Earth Balance	8.2	26.8	4.15
CATEGORY TOTAL	705.8	-4.5	2.25

TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25.

Source: IRI

REFRIGERATED BUTTER/BUTTER BLENDS

Price increases led a 17.3% rise in dollars despite units being off almost 2%. Top national brand Land O' Lakes (31.4% of dollars, up 5.6% in units) closed the gap on private label (48.3%, down 6.3% in units) for the No. 1 spot overall.

TOP VENDORS	\$ SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE
Private label	\$1,259.5	16.4%	48.3%
Land O' Lakes	832.5	18.1	31.9
Challenge Dairy Products	127.3	34.4	4.9
Keller's Creamery	68.4	-0.2	2.6
Irish Dairy Board	42.2	70.2	1.6

TOP VENDORS	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	AVG. PRICE PER UNIT
Private label	353.2	-6.3%	\$3.57
Land O' Lakes	229.3	4.8	3.63
Challenge Dairy Products	35.1	15.0	3.63
Keller's Creamery	21.7	-16.7	3.16
Irish Dairy Board	11.5	68.7	3.67

TOP BRANDS	\$ SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE
Private label	\$1,259.5	16.4%	48.3%
Land O' Lakes	819.9	19.2	31.4
Challenge Butter	119.6	34.9	4.6
Kerrygold	42.2	70.2	1.6
Breakstone's	38.8	11.0	1.5
Tillamook	36.7	5.1	1.4
Crystal Farms	30.9	3.9	1.2
Cabot	27.7	11.0	1.1
Keller's	17.1	-1.2	0.7
Darigold	16.6	-7.6	0.6

CATEGORY TOTAL 2,609.1 17.3 100.0

TOP BRANDS	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	AVG. PRICE PER UNIT
Private label	353.2	-6.3%	\$3.57
Land O' Lakes	225.2	5.6	3.64
Challenge Butter	33.3	15.3	3.59
Kerrygold	11.5	68.7	3.67

The stat pool: the grocery headquarters annual State of the Industry Almanac takes a comprehensive look at dozens of supermarket categories; STATE OF THE INDUST....

Breakstone's	13.2	-4.2	2.93
Tillamook	9.2	-17.0	3.97
Crystal Farms	8.9	-14.3	3.49
Cabot	7.7	-4.7	3.61
Keller's	4.9	-19.0	3.48
Darigold	4.7	-29.0	3.54
CATEGORY TOTAL	725.9	-1.8	3.59

TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25.

Source: IRI

LIQUID LAUNDRY DETERGENT

Church & Dwight had a good year and was the only vendor with an increase in sales. However, No. 1 vendor Procter & Gamble is still the clear leader in the category with more than 56.6% dollar share. Overall the category topped \$5.1 billion, down 3.9%.

TOP VENDORS	\$ SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE
Procter & Gamble	\$2,923.6	-4.9%	56.6%
Church & Dwight Co.	889.2	1.8	17.2
The Sun Products Corp.	715.2	-5.9	13.9
The Dial Corp.	370.8	-4.3	7.2
Private label	125.5	-11.6	2.4

TOP VENDORS	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	AVG. PRICE PER UNIT
Procter & Gamble	299.2	1.8%	\$9.77
Church & Dwight Co.	184.1	11.4	4.83
The Sun Products Corp.		116.8	-7.2
The Dial Corp.	83.0		4.47
Private label	21.5	-10.5	5.84

TOP BRANDS	\$ SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE
Tide	\$1,129.0	-11.0%	21.9%
Gain	518.1	-11.7	10.0
All	303.1	-3.2	5.9
Arm & Hammer	271.1	-1.7	5.3
Tide Plus A Touch of Downy		250.6	6.9
Purex	226.8	-10.6	4.4
Tide Plus Febreze	220.5	-24.6	4.3
Tide Simply Clean and Fresh	167.5	22,030.4	3.2
Arm & Hammer Plus Oxi Clean	163.5	-3.1	3.2
Xtra	162.1	-8.7	3.1

TOP BRANDS	CATEGORY TOTAL	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	AVG. PRICE PER UNIT
	5,162.2		-3.9	100.0

The stat pool: the grocery headquarters annual State of the Industry Almanac takes a comprehensive look at dozens of supermarket categories; STATE OF THE INDUST....

Tide	104.4	-8.4%	\$10.81
Gain	52.6	-12.6	9.86
All	40.4	-4.9	7.50
Arm & Hammer	50.72.1		5.35
Tide Plus A Touch of Downy	24.6	23.6	10.20
Purex	50.3	-11.5	4.51
Tide Plus Febreze	20.8	-19.7	10.61
Tide Simply Clean and Fresh	29.7	21,352.0	5.64
Arm & Hammer Plus Oxi Clean	31.13.2		5.25
Xtra	45.7	-11.4	3.55
CATEGORY TOTAL	734.6	-1.2	7.03

TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25.

Source: IRI

PAPER TOWELS

The almost \$ 5 billion category was basically flat in dollars, down 2.3 in units. Bounty products took the top two nationally branded spots, while Sparkle brands were third and fourth. Procter & Gamble had 44% dollar share, followed by private label at 27.1%.

\$ SALES	CHANGE VS.	TOP VENDORS (MILLIONS)	YEAR AGO	SHARE
Procter & Gamble	\$2,155.1		-1.9%	44.0%
Private label	1,326.0	1.7	27.1	
Georgia-Pacific Consumer Prds		829.8	1.1	16.9
Kimberly Clark Corp.	507.9		5.4	10.4
Oasis Brands	29.7	43.3	0.6	

UNIT SALES	CHANGE VS.	TOP VENDORS (MILLIONS)	YEAR AGO	AVG. PRICE PER UNIT
Procter & Gamble	292.4		-5.3%	\$7.37
Private label	458.4	-3.5		2.89
Georgia-Pacific Consumer Prds		157.2	-1.1	5.28
Kimberly Clark Corp.	99.3		10.2	5.11
Oasis Brands	9.4	41.7		3.14

\$ SALES	CHANGE VS.	TOP BRANDS (MILLIONS)	YEAR AGO	SHARE
Private label	\$1,326.0		1.7%	27.1%
Bounty Select A Size	1,182.8		7.3	24.2
Bounty	616.1	-15.9	12.6	
Sparkle	253.1	-11.6	5.2	
Sparkle Pick A Size	234.9		21.7	4.8
Brawny Pick A Size	171.7		-5.2	3.5
Bounty Basic	165.8	-17.3	3.4	
Scott Choose A Size	160.1		3.9	3.3
Kleenex Viva Choose A Size	124.5		-6.9	2.5
Bounty Basic Select A Size	111.4		36.3	2.3
CATEGORY TOTAL	4,895.6		0.2	100.0

The stat pool: the grocery headquarters annual State of the Industry Almanac takes a comprehensive look at dozens of supermarket categories; STATE OF THE INDUST....

UNIT SALES TOP BRANDS (MILLIONS)	CHANGE VS. YEAR AGO	AVG. PRICE PER UNIT
Private label 458.4	-3.5%	\$2.89
Bounty Select A Size	130.4	4.2 9.07
Bounty	78.1	-22.5 7.89
Sparkle	69.0	-12.7 3.67
Sparkle Pick A Size	41.2	37.8 5.70
Brawny Pick A Size	28.7	-7.0 5.97
Bounty Basic	54.7	-2.2 3.03
Scott Choose A Size	28.3	1.9 5.66
Kleenex Viva Choose A Size	22.3	-2.0 5.58
Bounty Basic Select A Size	14.3	45.2 7.76
CATEGORY TOTAL	1,039.5	-2.3 4.71

TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25.

Source: IRI

DISH DETERGENT

Procter & Gamble captured more than half of category dollars between its Dawn (No. 1 brand). Gain (No. 4), Ivory (No. 9) and Joy (No. 10) products. Colgate Palmolive held the second vendor spot on the strength of its Palmolive and Ajax brands. Category sales topped \$1.5 billion, up .3%.

TOP VENDORS (MILLIONS)	\$ SALES YEAR AGO	CHANGE VS. SHARE
Procter & Gamble	\$872.6	1.4% 55.5%
Colgate Palmolive Co.	509.0	-1.7 32.4
Private label	87.6	7.2 5.5
Seventh Generation	21.1	23.0 1.3
Phoenix Brands	19.3	-0.3 1.2

TOP VENDORS (MILLIONS)	UNIT SALES YEAR AGO	CHANGE VS. AVG. PRICE PER UNIT
Procter & Gamble	334.8	-0.1% \$2.61
Colgate Palmolive Co.	234.8	-1.6 2.17
Private label	41.7	-0.6 2.10
Seventh Generation	6.4	22.5 3.29
Phoenix Brands	18.7	0.7 1.03

TOP BRANDS (MILLIONS)	\$ SALES YEAR AGO	CHANGE VS. SHARE
Dawn\$607.0	0.4%	38.6%
Palmolive	188.4	0.1 12.0
Ajax 186.4	3.6	11.8
Gain 102.2	-6.5	6.5
Private label	87.6	7.2 5.5
Palmolive Soft Touch	33.8	-2.3 2.1
Ajax Triple Action	31.8	-7.5 2.0

The stat pool: the grocery headquarters annual State of the Industry Almanac takes a comprehensive look at dozens of supermarket categories; STATE OF THE INDUST....

Dawn Power Clean	26.0	23.0	1.6
Ivory	25.1	-2.9	1.6
CATEGORY TOTAL		1,570.6	0.3
100.0			
UNIT SALES TOP BRANDS	CHANGE VS. (MILLIONS)	AVG. PRICE YEAR AGO	PER UNIT
Dawn	227.3	0.9%	\$2.67
Palmolive	81.2	-0.8	2.32
Ajax	88.1	0.8	2.11
Gain	49.5	-10.0	2.06
Private label	41.7	-0.6	2.10
Palmolive Soft Touch	15.4	-1.7	2.19
Ajax Triple Action	15.9	-7.9	2.00
Dawn Power Clean	9.6	31.6	2.70
Ivory	8.2	-2.9	3.04
CATEGORY TOTAL		666.4	-1.0
2.36			

TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25.

Source: IRI

TOILET TISSUE

In a category with nearly 100% household penetration, all vendors can do is really jockey for position. Procter & Gamble held onto the top spot, but it was a dead heat for second between Kimberly Clark and Georgia-Pacific. Store brands continue to do well, up almost 3% in dollars with nearly 20% market share.

\$ SALES TOP VENDORS	CHANGE VS. (MILLIONS)	YEAR AGO	SHARE
Procter & Gamble	\$2,428.8	0.0%	28.6%
Kimberly Clark Corp.	2,117.9	0.4	24.9
Georgia-Pacific Cnsumr Prds	2,115.7	-2.7	24.9
Private label	1,676.5	2.9	19.7
Oasis Brands	71.2	32.4	0.8
UNIT SALES TOP VENDORS	CHANGE VS. (MILLIONS)	AVG. PRICE YEAR AGO	PER UNIT
Procter & Gamble	255.9	-3.1%	\$9.49
Kimberly Clark Corp.	309.4	1.0	6.85
Georgia-Pacific Cnsumr Prds	341.3	-1.3	6.20
Private label	404.4	-4.6	4.15
Oasis Brands	18.0	27.6	3.97
\$ SALES TOP BRANDS	CHANGE VS. (MILLIONS)	YEAR AGO	SHARE
Private label	\$1,676.5	2.9%	19.7%
Angel Soft	1,162.1	-3.0	13.7
Charmin Ultra Soft	1,076.9	0.0	12.7
Charmin Ultra Strong	1,001.6	4.9	11.8

The stat pool: the grocery headquarters annual State of the Industry Almanac takes a comprehensive look at dozens of supermarket categories; STATE OF THE INDUST....

Scott929.1	0.3	10.9		
Quilted Nrthrn Ultra sft & strng	545.4	25.9	6.4	
Kleenex Cottonelle Clean Care		445.5	-1.6	5.2
Charmin Basic	311.0	-11.8	3.7	
Kleenex Ctonlle Ultra Cmftr Cr		301.1	62.8	3.5
Scott Extra Soft	298.9	7.4	3.5	
CATEGORY TOTAL	8,491.9	0.2	100.0	
UNIT SALES TOP BRANDS	CHANGE VS. (MILLIONS)	AVG. PRICE YEAR AGO	PER UNIT	
Private label	404.4	-4.6%	\$4.15	
Angel Soft	229.5	-1.0	5.06	
Charmin Ultra Soft	103.5	-3.6	10.41	
Charmin Ultra Strong	94.7	0.6	10.57	
Scott	143.8	-0.1	6.46	
Quilted Nrthrn Ultra sft & strng	65.0	20.8	8.39	
Kleenex Cottonelle Clean Care		61.2	-1.5	7.28
Charmin Basic	52.7	-7.8	5.90	
Kleenex Ctonlle Ultra Cmftr Cr		38.7	60.5	7.79
Scott Extra Soft	42.6	9.3	7.02	
CATEGORY TOTAL		1,355.4	-1.9	6.27

TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25.

Source: IRI

FACIAL TISSUE

Five varieties of the Kleenex brand, essentially synonymous with facial tissue, provided Kimberly Clark with 45.9% of category sales. Procter & Gamble's Puff brand lofted the Cincinnati-based manufacturer to second spot with 26% of dollars. Overall, category dollars were down 0.3% totaling more than \$1.5 billion.

\$ SALES TOP VENDORS (MILLIONS)	CHANGE VS. YEAR AGO	SHARE		
Kimberly Clark Corp.	\$724.3	-1.6%	45.9%	
Procter & Gamble	410.4	-1.3	26.0	
Private label	370.6	3.9	23.4	
Irving Tissue Converters	51.7	-3.5	3.2	
Georgia Pacific Consumer Prod		13.5	-6.0	0.8
UNIT SALES TOP VENDORS (MILLIONS)	CHANGE VS. YEAR AGO	AVG. PRICE PER UNIT		
Kimberly Clark Corp.	295.9	-6.4%	\$2.45	
Procter & Gamble	154.0	0.6	2.66	
Private label	225.4	1.0	1.64	
Irving Tissue Converters	40.2	0.5	1.29	
Georgia Pacific Consumer Prod		8.7	11.9	1.54

The stat pool: the grocery headquarters annual State of the Industry Almanac takes a comprehensive look at dozens of supermarket categories; STATE OF THE INDUST....

\$ SALES		CHANGE VS.		
TOP BRANDS	(MILLIONS)	YEAR AGO	SHARE	
Kleenex	\$510.7	-1.4%	32.3%	
Private label	370.6	3.9	23.4	
Puffs Plus Lotion	200.0	-3.9	12.6	
Kleenex Ultra	154.5	4.2	9.7	
Puffs Ultra	90.0	3.6	5.7	
Puffs Basic	86.4	-3.7	5.4	
Scotties	51.7	-3.5	3.2	
Kleenex Anti Viral	21.8	6.6	1.3	
Kleenex Cool Touch	19.1	-26.8	1.2	
Kleenex Expressions	16.4	-17.9	1.0	
CATEGORY TOTAL	1,578.1	-0.3	100.0	

UNIT SALES		CHANGE VS.	AVG. PRICE	
TOP BRANDS	(MILLIONS)	YEAR AGO	PER UNIT	
Kleenex	211.5	-7.0%	\$2.41	
Private label	225.4	1.0	1.64	
Puffs Plus Lotion	78.7	0.5	2.54	
Kleenex Ultra	55.3	-1.4	2.79	
Puffs Ultra	35.8	4.1	2.51	
Puffs Basic	32.7	-6.6	2.64	
Scotties	40.2	0.5	1.29	
Kleenex Anti Viral	9.6	7.9	2.26	
Kleenex Cool Touch	10.0	-20.0	1.91	
Kleenex Expressions	8.9	-15.5	1.84	
CATEGORY TOTAL	731.3	-2.0	2.16	

TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25.

Source: IRI

PAPER NAPKINS

Paper napkin dollars and units were both down, 3.6% and 3.9% respectively. Store brands were the most popular choice, with 43.2% of dollars, a slight improvement versus last year. The top two national brands, Vanity' Fair and Bounty Quilted also showed gains versus last year.

\$ SALES		CHANGE VS.		
TOP VENDORS	(MILLIONS)	YEAR AGO	SHARE	
Private label	\$306.5	1.7%	43.2%	
Georgia Pacific Consumer Prod	181.4	-5.6	25.6	
Procter & Gamble	98.3	-5.1	13.8	
Kimberly-Clark Corp.	30.0	-15.8	4.2	
Creative Converting	18.7	16.6	2.6	

UNIT SALES		CHANGE VS.	AVG. PRICE	
TOP VENDORS	(MILLIONS)	YEAR AGO	PER UNIT	
Private label	149.0	-1.6%	\$2.06	
Georgia Pacific Consumer Prod	52.3	-1.3	3.47	

The stat pool: the grocery headquarters annual State of the Industry Almanac takes a comprehensive look at dozens of supermarket categories; STATE OF THE INDUST....

Procter & Gamble	27.4	-6.8	3.58
Kimberly-Clark Corp.	10.2	-14.4	2.94
Creative Converting	13.0	19.4	1.44

\$ SALES CHANGE VS.
TOP BRANDS (MILLIONS) YEAR AGO SHARE

Private label	\$306.5	1.7%	43.2%
Vanity Fair	109.0	0.8	15.3
Bounty Quilted	87.7	1.2	12.3
Kleenex	28.6	-9.6	4.0
Marathon	25.1	-4.3	3.5
Mardi Gras	24.2	-1.0	3.4
Dixie	21.0	-33.6	2.9
Bounty	10.1	-35.5	1.4
Party Creations	7.0	30.4	0.9
CATEGORY TOTAL	708.3	-3.7	100.00

UNIT SALES CHANGE VS. AVG. PRICE
TOP BRANDS (MILLIONS) YEAR AGO PER UNIT

Private label	149.0	-1.6%	\$2.06
Vanity Fair	36.2	1.8	3.01
Bounty Quilted	26.1	-2.5	3.35
Kleenex	9.9	-9.7	2.88
Marathon	1.5	-4.5	16.26
Mardi Gras	9.4	-0.8	2.56
Dixie	4.6	-19.1	4.51
Bounty	1.1	-50.0	9.16
Party Creations	6.0	32.0	1.16
CATEGORY TOTAL	294.0	-3.9	2.41

TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25.

Source: IRI

PEANUT BUTTER

The top three brands were up in units, though down in dollars. JIF was No. 1 with more than a 36% of dollar share. Store brands were second at 19.2% and Skippy was third. Overall category dollars sales approached \$2 billion, down 4.2%.

\$ SALES CHANGE VS.
TOP VENDORS (MILLIONS) YEAR AGO SHARE

The J.M. Smucker Co.	\$889.6	-3.3%	46.3%
Private label	368.4	-3.2	19.2
Hormel Foods	333.3	-1.2	17.4
ConAgra Foods	187.6	-10.5	9.8
Boulder Brands	23.2	-11.0	1.2

UNIT SALES CHANGE VS. AVG. PRICE
TOP VENDORS (MILLIONS) YEAR AGO PER UNIT

The J.M. Smucker Co.	229.0	2.0%	\$3.88
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The stat pool: the grocery headquarters annual State of the Industry Almanac takes a comprehensive look at dozens of supermarket categories; STATE OF THE INDUST....

Private label	128.7	3.9	2.86
Hormel Foods	90.8	4.1	3.67
ConAgra Foods	58.3	-9.0	3.22
Boulder Brands	6.3	-8.8	3.68

TOP BRANDS	\$ SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE
JIF\$697.5	-4.2%	36.3%	
Private label	368.4	-3.2	19.2
Skippy	233.4	-2.1	12.2
Peter Pan	182.9	-10.0	9.5
Skippy Natural	88.1	4.0	4.6
Smucker's	57.6	-4.5	3.0
JIF To Go	29.2	-2.8	1.5
Smucker's Goober	28.7	-4.7	1.5
Smart Balance	23.2	-11.0	1.2
Adams	20.1	-1.9	1.0
CATEGORY TOTAL	1,919.5	-4.2	100.0

TOP BRANDS	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	AVG. PRICE PER UNIT
JIF168.9	1.6%	\$4.13	
Private label	128.7	3.9	2.86
Skippy	63.2	2.8	3.69
Peter Pan	56.5	-8.5	3.24
Skippy Natural	25.3	6.2	3.48
Smucker's	15.5	-4.3	3.71
JIF To Go	12.3	-6.3	2.37
Smucker's Goober	8.9	-2.9	3.21
Smart Balance	6.3	-8.8	3.68
Adams4.4	-0.1	4.51	
CATEGORY TOTAL	545.5	0.1	3.52

TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25.

Source: IRI

SS JAM/JELLY/PRESERVES

With three Smucker's branded products in the top 10, The J.M. Smucker's Co. is far and away the top vendor with 44.4% dollar share. Private label beat out Welch Foods for second spot, 19.8% to 15.5%. Overall all category sales were \$922 million, down 2.2%.

TOP VENDORS	\$ SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE
The J.M. Smucker Co.	\$409.0	-1.9%	44.4%
Private label	182.7	-3.9	19.8
Welch Foods	142.9	-3.5	15.5
American Marketing Team	48.1	10.2	5.2
B & G Foods	37.3	-4.6	4.1

The stat pool: the grocery headquarters annual State of the Industry Almanac takes a comprehensive look at dozens of supermarket categories; STATE OF THE INDUST....

TOP VENDORS	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	AVG. PRICE PER UNIT
The J.M. Smucker Co.	142.7	-0.3%	\$2.86
Private label	79.4	-3.5	2.30
Welch Foods	63.3	-3.4	2.26
American Marketing Team	11.0	8.7	4.36
B & G Foods	14.2	-3.9	2.63
TOP BRANDS	\$ SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE
Smucker's	\$311.8	1.1%	33.8%
Private label	182.7	-3.9	19.8
Welch's	103.4	-3.1	11.2
Bonne Maman	48.1	10.2	5.2
Smucker's Sugar Free	37.8	-11.6	4.1
Smucker's Simply Fruit	28.8	-8.2	3.1
Polaner All Fruit	25.2	-4.2	2.7
Welch's Natural	22.0	-6.4	2.4
Bama	17.2	-3.1	1.9
Polaner	12.0	-5.2	1.3
CATEGORY TOTAL	922.1	-2.2	100.0
TOP BRANDS	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	AVG. PRICE PER UNIT
Smucker's	110.2	2.9%	\$2.83
Private label	79.4	-3.5	2.30
Welch's	45.8	-2.5	2.26
Bonne Maman	11.0	8.7	4.36
Smucker's Sugar Free	12.7	-11.5	2.98
Smucker's Simply Fruit	11.1	-7.8	2.59
Polaner All Fruit	9.7	-3.2	2.59
Welch's Natural	7.8	-6.7	2.80
Bama	9.5	-5.9	1.80
Polaner	4.4	-5.3	2.70
CATEGORY TOTAL	341.1	-1.8	2.70

TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25.

Source: IRI

BREAKFAST/CEREAL/SNACK BARS

Kellogg's had 56.7% of dollars. No other vendor had 9%. General Mills did enjoy healthy gains however, up 19% and its Nature Valley brand was up 68.9%. Overall, category dollars totaled more than \$ 1 billion, down 3.4%. Units were down 2.7%.

TOP VENDORS	\$ SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE
Kellogg Co.	\$606.5	-6.0%	56.7%
General Mills	92.2	19.0	8.6

The stat pool: the grocery headquarters annual State of the Industry Almanac takes a comprehensive look at dozens of supermarket categories; STATE OF THE INDUST....

Private label	89.3	1.4	8.3
Small Planet Foods		82.0	19.1
Quaker Oats Co.	32.0	4.1	3.0

TOP VENDORS	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	AVG. PRICE PER UNIT
Kellogg Co.	199.7	-5.6%	\$3.04
General Mills	31.1	13.3	2.97
Private label	42.62.2	2.10	
Small Planet Foods		48.5	16.0
Quaker Oats Co.	9.5	-4.0	3.37

TOP BRANDS	\$ SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE
Kellogg's Nutri Grain Bars	\$193.7	-1.3%	18.1%
Kellogg's Rice Krispies Treats	177.7	3.5	16.6
Kellogg's Special K Pstry Crsps	111.3	-28.4	10.4
Private label	89.3	1.4	8.3
Kellogg's Special K Bar	78.9	-32.5	7.4
Larabar	65.9	21.6	6.2
Nature Valley	57.0	68.9	5.3
Atkins Day Break	31.1	-24.7	2.9
Kellogg's Nutri Grain Harvest		18.2	2,526.1
Quaker Real Medleys	16.9		1.6
CATEGORY TOTAL	1,069.8	-3.4	100.0

TOP BRANDS	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	AVG. PRICE PER UNIT
Kellogg's Nutri Grain Bars	60.6	-2.4%	\$3.20
Kellogg's Rice Krispies Treats	59.3	-0.8	3.00
Kellogg's Special K Pstry Crsps	36.7	-28.1	3.03
Private label	42.62.2	2.10	
Kellogg's Special K Bar	26.1	-29.7	3.02
Larabar	40.1	17.2	1.64
Nature Valley	17.0	66.1	3.35
Atkins Day Break	5.3	-23.1	5.88
Kellogg's Nutri Grain Harvest		6.7	2,315.1
Quaker Real Medleys	5.3	-9.0	3.17
CATEGORY TOTAL	390.4	-2.7	2.74

TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25.

Source: IRI

PRETZELS

Pretzel dollar sales dipped below the \$ 1 billion mark. Snyder's-Lance is far and away the category leader with more than 40% of the dollars, led primarily by its Snyder's of Hanover brand. Store brands and Frito Lay's Rold Gold were the only other two brands in double-digits.

\$ SALES	CHANGE VS.
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The stat pool: the grocery headquarters annual State of the Industry Almanac takes a comprehensive look at dozens of supermarket categories; STATE OF THE INDUST....

TOP VENDORS	(MILLIONS)	YEAR	AGO	SHARE
Snyder's-Lance	\$403.1		0.3%	40.7%
Private label	171.4		11.7	17.3
Frito Lay	164.0		-11.3	16.6
Utz Quality Foods	76.1		-5.3	7.7
Mars	47.2		-0.4	4.8

UNIT SALES	CHANGE VS.	AVG. PRICE		
TOP VENDORS	(MILLIONS)	YEAR	AGO	PER UNIT
Snyder's-Lance	133.6		-1.4%	\$3.02
Private label	83.0		5.1	2.07
Frito Lay	57.9		-12.0	2.83
Utz Quality Foods		22.1		-5.6 3.45
Mars	22.0		-3.6	2.14

\$ SALES	CHANGE VS.			
TOP BRANDS	(MILLIONS)	YEAR	AGO	SHARE
Snyder's of Hanover	\$381.4		-1.2%	38.5%
Private label	171.4		11.7	17.3
Rold Gold	164.0		-11.3	16.6
Utz	67.8		-5.2	6.8
Combos	47.2		-0.4	4.8
Snyder's of Hanover 100 Cal Pck		17.5		11.1 1.8
Glutino	14.5		-19.1	1.5
Bachman	14.3		3.4	1.4
Herr's	13.4		-38.3	1.4
Anderson	13.4		-19.8	1.4

CATEGORY TOTAL			
	990.5	-1.7	100.0

UNIT SALES	CHANGE VS.	AVG. PRICE		
TOP BRANDS	(MILLIONS)	YEAR	AGO	PER UNIT
Snyder's of Hanover	128.2		-2.8%	\$2.98
Private label	83.0		5.1	2.07
Rold Gold	57.9		-12.0	2.83
Utz	19.7		-5.0	3.44
Combos	22.0		-3.6	2.14
Snyder's of Hanover 100 Cal Pck		4.0		11.1 4.41
Glutino	2.8		-12.0	5.12
Bachman	5.3		4.2	2.68
Herr's	4.6		-23.8	2.90
Anderson	3.0		-21.5	4.44

CATEGORY TOTAL			
	367.0	-2.7	2.70

TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25.

Source: IRI

POTATO CHIPS

Frito Lay holds down the top three branded spots with its Lays, Wavy Lays and Ruffles brands. In total Frito Lay accounts for 60% of potato chips dollar sales. Overall it was a good year for the

The stat pool: the grocery headquarters annual State of the Industry Almanac takes a comprehensive look at dozens of supermarket categories; STATE OF THE INDUST....

category as dollars were up 4.1% accounting for more than \$5.6 billion. Unit sales were also up a healthy 4%.

TOP VENDORS	\$ SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE
Frito Lay	\$3,415.0	4.5%	60.0%
Kellogg Co.	598.5	-1.1	10.5
Private label	451.6	7.5	7.9
Utz Quality Foods	224.5	4.9	3.9
Cape Cod Potato Chip	185.9	21.3	3.3

TOP VENDORS	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	AVG. PRICE PER UNIT
Frito Lay	1,388.5	4.5%	\$2.46
Kellogg Co.	361.7	-0.4	1.65
Private label	236.9	9.7	1.91
Utz Quality Foods	117.5	3.7	1.91
Cape Cod Potato Chip	61.1	20.8	3.04

TOP BRANDS	\$ SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE
Lays	\$1,650.2	4.0%	29.0%
Wavy Lays	540.7	8.2	9.5
Ruffles	521.5	12.4	9.2
Pringles	514.4	1.2	9.0
Private label	451.6	7.5	7.9
Lays Kettle Cooked	287.1	11.0	5.0
Cape Cod	185.9	21.3	3.3
Utz	184.1	3.7	3.2
Kettle	147.9	10.8	2.6
Baked Lays	85.1	-4.0	1.5
CATEGORY TOTAL	5,688.7	4.1	100.0

TOP BRANDS	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	AVG. PRICE PER UNIT
Lays	693.5	2.2%	\$2.38
Wavy Lays	193.8	6.8	2.79
Ruffles	199.5	13.0	2.61
Pringles	332.8	1.8	1.55
Private label	236.9	9.7	1.91
Lays Kettle Cooked	105.9	11.2	2.71
Cape Cod	61.1	20.8	3.04
Utz	102.1	2.8	1.80
Kettle	56.6	10.6	2.62
Baked Lays	30.7	9.4	2.77
CATEGORY TOTAL	2,547.1	4.0	2.23

TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25.

Source: IRI

TORTILLA/TOSTADA CHIPS

The stat pool: the grocery headquarters annual State of the Industry Almanac takes a comprehensive look at dozens of supermarket categories; STATE OF THE INDUST....

Doritos continues to grow. The No. 1 brand in the category was up almost 9%, improving its dollar share to 35%. Frito Lays' Tostitos and Tostitos Scoops were the No. 2 and No. 3 brands, up 1.6% and 4.7% respectively. On the Border was up 19.3% the biggest gain in the category.

\$ SALES CHANGE VS.

TOP VENDORS	(MILLIONS)	YEAR AGO	SHARE
Frito Lay	\$2,774.9	2.1%	72.0%
Private label	197.7	1.9	5.1
Truco Enterprises	142.2	19.2	3.7
Mission Foods	108.6	-4.8	2.8
Barcel USA	86.1	2.3	2.2

UNIT SALES CHANGE VS. AVG. PRICE

TOP VENDORS	(MILLIONS)	YEAR AGO	PER UNIT
Frito Lay	1,033.4	3.2%	\$2.69
Private label	103.4	0.6	1.91
Truco Enterprises	47.7	20.5	2.98
Mission Foods	39.2	-4.8	2.77
Barcel USA	37.2	-3.8	2.31

\$ SALES CHANGE VS.

TOP BRANDS (MILLIONS)	YEAR AGO	SHARE
Doritos	\$1,348.9	35.0%
Tostitos	601.2	15.6
Tostitos Scoops	421.2	4.7
Santitas	237.5	6.2
Private label	197.7	5.1
On the Border	142.0	3.7
Mission	107.1	2.8
Barcel Takis Fuego	77.2	2.0
Calidad	67.3	1.7
Doritos Jacked	43.6	1.1
CATEGORY TOTAL	3,853.9	100.0

UNIT SALES CHANGE VS. AVG. PRICE

TOP BRANDS (MILLIONS)	YEAR AGO	PER UNIT
Doritos	542.7	\$2.49
Tostitos	187.7	3.20
Tostitos Scoops	125.5	7.3
Santitas	116.2	2.04
Private label	103.4	1.91
On the Border	47.6	2.98
Mission	38.8	2.76
Barcel Takis Fuego	32.3	2.39
Calidad	36.8	1.83
Doritos Jacked	16.6	2.63
CATEGORY TOTAL	1,472.1	2.62

TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25.

The stat pool: the grocery headquarters annual State of the Industry Almanac takes a comprehensive look at dozens of supermarket categories; STATE OF THE INDUST....

Source: IRI

CONDENSED WET SOUP

It is soup giant Campbell's category. The Camden, N.J.-based company and its various brands control 82.3% of dollar sales, accounting for nearly \$1.3 billion. Campbell's Healthy Request product was up 4.7% and is catching store brands, down 1.7%, for the second spot (16.9% vs. 13.9%).

\$ SALES		CHANGE VS.		
TOP VENDORS	(MILLIONS)	YEAR AGO	SHARE	
Campbell Soup Co.	\$1,297.7	-2.2%	82.3%	
Private label	265.9	-1.7	16.9	
Pacific Foods of Oregon	3.3	32.4	0.2	
Look's Gourmet Food Co.	2.4	8.1	0.2	
Bay Valley Foods	1.7	3,865.5	0.1	

UNIT SALES		CHANGE VS.	AVG. PRICE	
TOP VENDORS	(MILLIONS)	YEAR AGO	PER UNIT	
Campbell Soup Co.	948.7	-4.1%	\$1.37	
Private label	277.7	-2.8	0.96	
Pacific Foods of Oregon	1.3	32.0	2.61	
Look's Gourmet Food Co.	0.6	6.3	3.81	
Bay Valley Foods	1.4	2,270.1	1.26	

\$ SALES		CHANGE VS.		
TOP BRANDS	(MILLIONS)	YEAR AGO	SHARE	
Campbell's	\$1,038.5	-3.6%	65.9%	
Private label	265.9	-1.7	16.9	
Campbell's Healthy Request	218.6	4.7	13.9	
Campbell's Light	12.3	-2.5	0.8	
Campbell's Disney Princess	9.5	3.4	0.6	
Campbell's Super Mario	5.7	90.1	0.4	
Campbell's Scooby Doo	4.9	-15.3	0.3	
Pacific Natural Foods	3.3	39.6	0.2	
Campbell's Disney Phineas Fb	3.1	-41.3	0.2	
Campbell's Danny Phntm Nickldn		2.5	-21.2	0.2
CATEGORY TOTAL	1,576.6	-2.0	100.0	

UNIT SALES		CHANGE VS.	AVG. PRICE	
TOP BRANDS	(MILLIONS)	YEAR AGO	PER UNIT	
Campbell's	779.7	-5.3%	\$1.33	
Private label	277.7	-2.8	0.96	
Campbell's Healthy Request	141.9	2.1	1.54	
Campbell's Light	8.2	-3.0	1.50	
Campbell's Disney Princess	6.4	2.7	1.50	
Campbell's Super Mario	3.8	84.7	1.50	
Campbell's Scooby Doo	3.2	-15.7	1.52	
Pacific Natural Foods	1.3	42.6	2.61	
Campbell's Disney Phineas Fb	2.0	-41.4	1.51	
Campbell's Danny Phntm Nickldn		1.7	-22.2	1.48
CATEGORY TOTAL	1,232.2	-3.8	1.28	

The stat pool: the grocery headquarters annual State of the Industry Almanac takes a comprehensive look at dozens of supermarket categories; STATE OF THE INDUST....

TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25.

Source: IRI

RTS WET SOUP

Campbell's versus Progresso. Campbell's leads the top 10 brand battle five to three. Yet Progresso holds the top spot with 33.9% of dollars. Campbell's products garnered 43.6% of dollars to General Mills' (maker of Progresso) 40.6%. Category sales were down, 2.8% in dollars, 2.6% in units.

\$ SALES CHANGE VS.

TOP VENDORS	(MILLIONS)	YEAR AGO	SHARE
Campbell Soup Co.	\$818.2	-4.2%	43.6%
General Mills	761.1	-2.1	40.6
Private label	73.6	-2.4	3.9
ConAgra Foods	55.2	-17.7	2.9
Amy's Kitchen	49.9	13.6	2.7

UNIT SALES CHANGE VS. AVG. PRICE

TOP VENDORS	(MILLIONS)	YEAR AGO	PER UNIT
Campbell Soup Co.	450.3	-3.0%	\$1.82
General Mills	437.0	-1.9	1.74
Private label	40.7	-5.0	1.81
ConAgra Foods	26.6	-17.1	2.07
Amy's Kitchen	18.5	13.4	2.70

\$ SALES CHANGE VS.

TOP BRANDS (MILLIONS)	YEAR AGO	SHARE
Progresso	\$635.0	-2.2%
Campbell's Chunky	426.4	-1.8
Campbell's Chunky Hlthy Rqst	122.4	-8.2
Campbell's Home Style	113.8	59.4
Progresso Light	102.6	-4.2
Private label	73.6	-2.4
Amy's	49.9	14.3
Healthy Choice	46.3	-18.0
Campbell's	44.1	14.3
Campbell's Soup On the Go	40.3	-6.1
CATEGORY TOTAL	1,875.5	2.2

CATEGORY TOTAL 1,875.5 -2.8 100.0

UNIT SALES CHANGE VS. AVG. PRICE

TOP BRANDS (MILLIONS)	YEAR AGO	PER UNIT
Progresso	363.4	-2.2%
Campbell's Chunky	239.2	0.2
Campbell's Chunky Hlthy Rqst	70.0	-7.3
Campbell's Home Style	63.3	52.6
Progresso Light	60.2	-3.1
Private label	40.7	1.8i
Amy's	18.5	13.6

The stat pool: the grocery headquarters annual State of the Industry Almanac takes a comprehensive look at dozens of supermarket categories; STATE OF THE INDUST....

Healthy Choice	24.5	-14.8	1.89
Campbell's	24.8	14.3	1.78
Campbell's Soup On the Go	25.3	-5.2	1.59
CATEGORY TOTAL	1,015.4	-2.6	1.85

TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25.

Source: IRI

DRY SOUP

An average price per unit of \$ 1.70 makes products in this category relatively inexpensive. Unilever, with three Lipton brands and its Knorr brand in the top 10 had 44.4% of dollars. Overall the category was relatively flat, up 0.3% in dollars, down 0.8% in units.

\$ SALES		CHANGE VS.	TOP VENDORS	(MILLIONS)	YEAR AGO	SHARE
Unilever Bestfoods Nrth Amer	\$163.2	-0.3%				44.4%
Bear Creek Country Kitchens	62.1	0.9				16.9
Nong Shim Co.	27.2	19.9				7.4
Private label	26.6	-4.3				7.2
N.K. Hurst Co.	15.2	0.8				4.1

UNIT SALES		CHANGE VS.	TOP VENDORS	(MILLIONS)	YEAR AGO	AVG. PRICE PER UNIT
Unilever Bestfoods Nrth Amer	110.1	-1.2%				\$1.48
Bear Creek Country Kitchens	17.3	-0.4				3.58
Nong Shim Co.	18.9	18.0				1.44
Private label	22.6	-4.2				1.18
N.K. Hurst Co.	5.7	0.3				2.66

\$ SALES		CHANGE VS.	TOP BRANDS (MILLIONS)	YEAR AGO	SHARE
Lipton Recipe Secrets	\$84.4	-0.8%			22.9%
Bear Creek Country Kitchens	62.1	0.9			16.9
Lipton Soup Secrets	41.9	0.8			11.4
Private label	26.6	-4.3			7.2
Knorr	26.3	1.1			7.2
Nong Shim	25.5	18.5			6.9
Hurst's HamBeens	14.9	1.2			4.0
Wyler's Mrs. Grass	11.8	-5.7			3.2
Lipton Cup A Soup	10.5	-4.1			2.8
Shore Lunch	5.6	-10.0			1.5
CATEGORY TOTAL	367.6	0.3			100.0

UNIT SALES		CHANGE VS.	TOP BRANDS (MILLIONS)	YEAR AGO	AVG. PRICE PER UNIT
Lipton Recipe Secrets	52.5	-2.3%			\$1.61
Bear Creek Country Kitchens	17.3	-0.4			3.58
Lipton Soup Secrets	28.2	0.6			1.48

The stat pool: the grocery headquarters annual State of the Industry Almanac takes a comprehensive look at dozens of supermarket categories; STATE OF THE INDUST....

Private label	22.6	-4.2	1.18
Knorr	22.2	0.4	1.18
Nong Shim	17.9	18.0	1.43
Hurst's HamBeens	5.6	0.8	2.66
Wyler's Mrs. Grass	6.2	0.1	1.90
Lipton Cup A Soup	7.1	-4.4	1.47
Shore Lunch	1.6	-9.3	3.42
CATEGORY TOTAL	216.8	-0.8	1.70

TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25.

Source: IRI

COOKING & SALAD OILS

Top national vendor ConAgra Foods, down 12.3% in dollars for 14.3% share, lost ground to its main competitors J.M. Smucker Co. (up 3.8%, 13.8% share) ACH Food Cos. (up 3.5%, 10.7% share) and Ventura Foods (up 9.4%, 5.8% share). Private label led all with a 40.2% dollar share, down 6.7%.

TOP VENDORS	\$ SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE
Private label	\$749.8	-6.7%	40.2%
ConAgra Foods	266.3	-12.3	14.3
The J.M. Smucker Co.	258.1	3.8	13.8
ACH Food Cos.	199.1	3.5	10.7
Ventura Foods	107.3	9.4	5.8

TOP VENDORS	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	AVG. PRICE PER UNIT
Private label	198.5	-0.2%	\$3.78
ConAgra Foods	57.1	-8.5	4.67
The J.M. Smucker Co.	70.3	17.8	3.67
ACH Food Cos.	38.0	8.1	5.24
Ventura Foods	17.1	16.0	6.27

TOP BRANDS	\$ SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE
Private label	\$749.8	-6.7%	40.2%
Wesson	266.3	-12.3	14.3
Crisco	258.1	3.8	13.8
Mazola	175.6	3.7	9.4
Lou Ana	107.3	9.4	5.8
Spectrum Naturals	50.9	24.6	2.7
BetterBody Foods	23.2	218.5	1.2
123	23.0	-12.9	1.2
Pompeian OlivExtra	19.9	23.0	1.1
Smart Balance Omega	13.7	-15.6	0.7
CATEGORY TOTAL	1,865.5	-1.5	100.0

UNIT SALES CHANGE VS. AVG. PRICE

The stat pool: the grocery headquarters annual State of the Industry Almanac takes a comprehensive look at dozens of supermarket categories; STATE OF THE INDUST....

TOP BRANDS	(MILLIONS)	YEAR AGO	PER UNIT
Private label	198.5	-0.2%	\$3.78
Wesson	57.1	-8.5	4.67
Crisco	70.3	17.9	3.67
Mazola	31.5	9.0	5.58
Lou Ana	17.1	16.0	6.27
Spectrum Naturals	6.3	24.1	8.12
BetterBody Foods2.0	146.4	11.53	
123	9.3	-14.8	2.48
Pompeian OlivExtra	3.5	25.0	5.67
Smart Balance Omega	3.4	-15.8	4.05
CATEGORY TOTAL	431.2	1.7	4.33

TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25.

Source: IRI

OLIVE OIL

After a year of solid growth, olive oil sales slowed, up only 1.4% in dollars compared to a previous increase of more than 5%. Overall, the category accounted for more than \$1 billion. Pompeian enjoyed the most growth among vendors, up 18.2%. Private label paced both vendors and brands with 29.6% dollar share.

TOP VENDORS	\$ SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE
Private label	\$319.6	-0.1%	29.6%
Med Foods	204.2	-5.8	18.9
Salov S P.A.	137.6	1.4	12.7
Pompeian	105.1	18.2	9.7
Colavita USA	39.8	2.7	3.7

TOP VENDORS	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	AVG. PRICE PER UNIT
Private label	49.9	1.2%	\$6.41
Med Foods	21.7	-6.5	9.41
Salov S P.A.	17.5	4.3	7.87
Pompeian	15.8	11.8	6.67
Colavita USA	3.8	4.8	10.52

TOP BRANDS	\$ SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE
Private label	\$319.6	-0.1%	29.6%
Bertolli	166.2	-3.9	15.4
Filippo Berio	137.4	1.5	12.7
Pompeian	104.9	18.8	9.7
Colavita	36.8	3.5	3.4
Star	31.0	-3.6	2.9
California Olive Ranch	29.2	45.1	2.7
Botticelli	23.9	-3.5	2.2
Bertolli Classico	15.5	-0.8	1.4

The stat pool: the grocery headquarters annual State of the Industry Almanac takes a comprehensive look at dozens of supermarket categories; STATE OF THE INDUST....

Olivari13.8	31.9	1.3
CATEGORY TOTAL	1,080.8	1.4

TOP BRANDS	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	AVG. PRICE PER UNIT
Private label	49.9	1.2%	\$6.41
Bertolli	17.9	-4.2	9.31
Filippo Berio	17.5	4.4	7.87
Pompeian	15.7	12.4	6.67
Colavita	3.3	5.1	11.13
Star	4.0	-6.3	7.74
California Olive Ranch		3.2	40.8
Botticelli	3.0	-7.3	8.02
Bertolli Classico	1.1	-2.3	13.68
Olivari2.3	28.7		6.11
CATEGORY TOTAL	145.7	1.1	7.42

TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25.

Source: IRI

MICROWAVE BROWNING/PAN SPRAY

Both dollar and units sales were relatively unchanged, up 0.9% and 0.1% respectively. ConAgra Foods and its Pam brand accounted for more than half of category sales. Private label was the only other brand with significant impact, capturing 34.7% of dollars.

TOP VENDORS (MILLIONS)	\$ SALES	CHANGE VS. YEAR AGO	SHARE
ConAgra Foods	\$178.3	-0.5%	51.7%
Private label	119.7	-0.9	34.7
The J.M. Smucker Co.	14.8	1.8	4.3
B & G Foods	11.0	-0.1	3.2
Boulder Brands	7.8	3.5	2.3

TOP VENDORS (MILLIONS)	UNIT SALES	CHANGE VS. YEAR AGO	AVG. PRICE PER UNIT
ConAgra Foods	55.4	-1.5%	\$3.22
Private label	51.7	-0.8	2.31
The J.M. Smucker Co.	6.5	2.6	2.29
B & G Foods	4.9	-0.3	2.23
Boulder Brands	2.9	4.9	2.75

TOP BRANDS (MILLIONS)	\$ SALES	CHANGE VS. YEAR AGO	SHARE
Pam	\$176.9	0.9%	51.3%
Private label	119.7	-0.9	34.7
Crisco	13.8	4.0	4.0
Baker's Joy	10.1	1.7	2.9
Smart Balance Omega	5.5	-7.9	1.6

The stat pool: the grocery headquarters annual State of the Industry Almanac takes a comprehensive look at dozens of supermarket categories; STATE OF THE INDUST....

Spectrum	2.5	109.9	0.7
Smart Balance	2.3	45.7	0.7
Winona pure	1.9	4.9	0.6
Mazola 1.7	2.2	0.5	
Pompeian	1.6	457.8	0.5
CATEGORY TOTAL	344.7	0.9	100.0

UNIT SALES TOP BRANDS	CHANGE VS. (MILLIONS)	AVG. PRICE YEAR AGO	PER UNIT
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Pam	54.6	0.7%	\$3.24
Private label	51.7	-0.8	2.31
Crisco	6.1	4.4	2.28
Baker's Joy	4.6	1.8	2.19
Smart Balance Omega		2.0	-6.5
Spectrum	0.4	113.1	5.55
Smart Balance	0.9	47.2	2.75
Winona pure	0.6	1.0	3.09
Mazola	0.8	5.0	2.21
Pompeian	0.3	404.5	4.98

CATEGORY TOTAL	125.0	0.1	2.76
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TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25.

Source: IRI

CHEESE SNACKS

Frito Lay just gets bigger and bigger. Buoyed by the Cheetos brand, up 7.1% in dollars for a 70.8% market share, Frito Lay generated more than \$1 billion, up 5% with more than 82% of the category. Baked Cheetos did particularly well, up 12.2% in dollars, 30.4% in units.

\$ SALES TOP VENDORS	CHANGE VS. (MILLIONS)	YEAR AGO	SHARE
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Frito Lay	\$1,077.6	5.0%	82.4%
Private label	47.1	5.6	3.6
Utz Quality Foods	43.3	-0.3	3.3
Wise Foods	21.2	-7.3	1.6
Herr Foods	15.2	1.5	1.2

UNIT SALES TOP VENDORS	CHANGE VS. (MILLIONS)	AVG. PRICE YEAR AGO	PER UNIT
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Frito Lay	538.5	1.6%	\$2.00
Private label	125.3	3.6	1.86
Utz Quality Foods	14.8	6.6	2.93
Wise Foods	15.1	-8.9	1.40
Herr Foods	9.4	1.1	1.62

\$ SALES TOP BRANDS (MILLIONS)	CHANGE VS. YEAR AGO	SHARE
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Cheetos	\$926.4	7.1%	70.8%
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The stat pool: the grocery headquarters annual State of the Industry Almanac takes a comprehensive look at dozens of supermarket categories; STATE OF THE INDUST....

Chester's	67.1	-0.7	5.1
Private label	47.1	5.6	3.6
Utz	39.5	-3.9	3.0
Cheetos Mix Ups	31.2	-24.8	2.4
Baked Cheetos	27.4	12.2	2.1
Cheetos Simply	22.8	NA1.7	
Wise Cheez Doodles	20.6	-7.2	1.6
Herr's	15.0	1.6	1.1
Bachman Jax	11.3	11.6	0.9
CATEGORY TOTAL	1,307.9	4.3	100.0

TOP BRANDS (MILLIONS)	UNIT SALES	CHANGE VS. YEAR AGO	AVG. PRICE PER UNIT
Cheetos	474.4	2.7%	\$1.95
Chester's	34.0	0.0	1.97
Private label	25.3	3.6	1.86
Utz	13.1	-1.7	3.01
Cheetos Mix Ups	13.1	-31.1	2.37
Baked Cheetos	9.4	30.4	2.92
Cheetos Simply	6.7	NA 3.39	
Wise Cheez Doodles	14.8	-8.8	1.39
Herr's	9.3	0.5	1.61
Bachman Jax	4.8	10.1	2.33
CATEGORY TOTAL	657.1	1.5	1.99

TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25.

Source: IRI

ALL OTHER CRACKERS

Sunshine's Cheez It brand was No. 1 with nearly 13% of dollars. However the top vendor was Mondelez, accounting for more than 32% of sales on the strength of its Nabisco brands (Ritz, Wheat Thins and Triscuits). Pepperidge Farms also did well with its Goldfish brand crackers.

TOP VENDORS	\$ SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE
Mondelez International	51,614.1	-0.8%	32.5%
Sunshine Biscuits	766.1	5.2	15.4
Pepperidge Farm	746.8	1.0	15.0
Kellogg Co.	601.8	-4.0	12.1
Private label	234.5	-1.1	4.7
TOP VENDORS	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	AVG. PRICE PER UNIT
Mondelez International	605.0	0.3%	\$2.67
Sunshine Biscuits	271.3	7.6	2.82
Pepperidge Farm	285.8	2.3	2.61
Kellogg Co.	208.4	-4.9	2.89
Private label	121.8	-2.4	1.92

The stat pool: the grocery headquarters annual State of the Industry Almanac takes a comprehensive look at dozens of supermarket categories; STATE OF THE INDUST....

\$ SALES		CHANGE VS.	
TOP BRANDS (MILLIONS)	YEAR AGO	SHARE	
Sunshine Cheez It	\$632.4	0.1%	12.7%
Nabisco Ritz	500.6	-2.0	10.1
Pepperidge Farm Goldfish	459.6	4.5	9.3
Nabisco Wheat Thins	344.8	-8.1	6.9
Nabisco Triscuit	323.8	-8.1	6.5
Private label	234.5	-1.1	4.7
Stacy's	215.6	1.6	4.3
Keebler Club	214.3	3.2	4.3
Keebler Townhouse	212.0	19.2	4.3
Snack Factory Pretzel Crisps		176.8	8.1
CATEGORY TOTAL	4,967.0	0.9	100.0
UNIT SALES		CHANGE VS.	AVG. PRICE
TOP BRANDS (MILLIONS)	YEAR AGO	PER UNIT	
Sunshine Cheez It	224.4	2.8%	\$2.82
Nabisco Ritz	181.9	-2.8	2.75
Pepperidge Farm Goldfish	170.5	5.2	2.70
Nabisco Wheat Thins	126.2	-6.6	2.73
Nabisco Triscuit	122.6	-6.4	2.64
Private label	121.8	-2.4	1.92
Stacy's	64.0	2.4	3.37
Keebler Club	75.3	3.6	2.85
Keebler Townhouse	79.5	16.6	2.67
Snack Factory Pretzel Crisps		60.2	11.2
CATEGORY TOTAL	1,829.8	1.7	2.71

TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25.

Source: IRI

SNACK NUTS

The health benefits of nuts are not lost on consumers. The category accounted for \$3.8 billion, up 2.8%. Units were up 1.5%. Kraft and its Planters brand had a strong year and were the top national vendor and brand, but store brands held the No. 1 spot overall.

\$ SALES		CHANGE VS.	
TOP VENDORS (MILLIONS)	YEAR AGO	SHARE	
Private label	\$1,195.3	2.0%	31.2%
Kraft Foods Group	1,011.1	5.0	26.4
Paramount Farms	560.0	0.8	14.6
Blue Diamond Growers	407.0	12.6	10.6
Diamond Foods	116.4	-4.7	3.0
UNIT SALES		AVG. PRICE	
TOP VENDORS (MILLIONS)	YEAR AGO	PER UNIT	

The stat pool: the grocery headquarters annual State of the Industry Almanac takes a comprehensive look at dozens of supermarket categories; STATE OF THE INDUST....

Private label	286.6	4.0%	\$4.17
Kraft Foods Group	191.0	6.5	5.29
Paramount Farms	92.6	-4.9	6.05
Blue Diamond Growers	79.6	2.0	5.11
Diamond Foods	31.1	0.2	3.74

TOP BRANDS	\$ SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE
Private label	\$1,195.3	2.0%	31.2%
Planters	932.1	7.5	24.3
Wonderful	559.9	1.4	14.6
Blue Diamond	407.0	12.6	10.6
Emerald	113.5	-4.5	3.0
Planters Nutrition	67.3	11.1	1.8
Hampton Farms	66.1	21.6	1.7
Young Pecan	38.4	-6.2	1.0
Imperial Nuts	24.3	-19.4	0.6
Frito Lay	21.3	18.4	0.6
CATEGORY TOTAL	3,828.8	2.8	100.0

TOP BRANDS	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	AVG. PRICE PER UNIT
Private label	286.6	4.0%	\$4.17
Planters	177.7	9.5	5.24
Wonderful	92.6	-4.1	6.05
Blue Diamond	79.6	2.0	5.11
Emerald	30.8	0.6	3.68
Planters Nutrition	10.9	2.0	6.18
Hampton Farms	22.1	15.4	2.99
Young Pecan	2.9	-11.6	13.16
Imperial Nuts	8.5	-19.5	2.87
Frito Lay	12.1	16.1	1.76
CATEGORY TOTAL	885.9	1.5	4.32

TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25.

Source: IRI

GRANOLA BARS

The health benefits of nuts are not lost on consumers. The category accounted for \$3.8 billion, up 2.8%. Units were up 1.5%. Kraft and its Planters brand had a strong year and were the top national vendor and brand, but store brands held the No. 1 spot overall.

TOP VENDORS	\$ SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE
General Mills	\$622.1	-2.9%	39.1%
Quaker Oats Co.	402.4	1.3	25.3
Private label	143.9	-12.5	9.1
Kashi Co.	106.2	9.5	6.7
McKee Foods Corp.	84.8	8.8	5.3

The stat pool: the grocery headquarters annual State of the Industry Almanac takes a comprehensive look at dozens of supermarket categories; STATE OF THE INDUST....

TOP VENDORS	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	AVG. PRICE PER UNIT
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General Mills	176.2	-4.4%	\$3.53
Quaker Oats Co.	139.3	-1.1	2.89
Private label	62.7	-12.4	2.29
Kashi Co.	31.7	6.1	3.35
McKee Foods Corp.	37.6	12.8	2.25

TOP BRANDS	\$ SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE
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Nature Valley	\$387.3	-7.6%	24.4%	
Quaker Chewy	223.9	6.9	14.1	
Nature Valley Sweet & Salty Nut		217.6	6.0	13.7
Private label	143.9	-12.5	9.1	
Kashi	106.2	12.4	6.7	
Quaker Chewy Dipps	95.4	-6.7	6.0	
Sunbelt Bakery	83.9	8.8	5.3	
Kind Healthy Grains	48.9	793.0	3.1	
Quaker Big Chewy	37.9	35.7	2.4	
Atkins Advantage	30.6	-0.1	1.9	
CATEGORY TOTAL	1,589.2	-1.0	100.0	

TOP BRANDS	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	AVG. PRICE PER UNIT
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Nature Valley	105.7	-9.7%	\$3.67	
Quaker Chewy	73.6	5.0	3.04	
Nature Valley Sweet & Salty Nut		64.4	5.0	3.38
Private label	62.7	-12.4	2.29	
Kashi	31.7	9.1	3.35	
Quaker Chewy Dipps	31.7	-11.1	3.01	
Sunbelt Bakery	35.7	12.9	2.35	
Kind Healthy Grains	14.7	847.0	3.32	
Quaker Big Chewy	15.7	51.0	2.41	
Atkins Advantage	4.1	0.0	7.50	
CATEGORY TOTAL	518.2	-2.7	3.07	

TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25

Source: IRI

FLOUR

General Mills and its Gold Medal brand held top spot with 24.7% of dollars. Store brands were a close second at 23.5%. Overall, category dollars were flat, down just 0.2%, while units were down 1.7%. Average price per unit increased 4-cents.

TOP VENDORS	\$ SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE
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General Mills	\$180.6	-5.1%	25.8%
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The stat pool: the grocery headquarters annual State of the Industry Almanac takes a comprehensive look at dozens of supermarket categories; STATE OF THE INDUST....

Private label	164.6	-5.4	23.5
The J.M. Smucker Co.	103.1	-0.3	14.7
King Arthur Flour Co.	69.6	5.2	9.9
Bob's Red Mill Natural Foods	46.3	17.1	6.6

TOP VENDORS	UNIT SALES	CHANGE VS.	AVG. PRICE
	(MILLIONS)	YEAR AGO	PER UNIT
General Mills	69.1	-5.6%	\$2.61
Private label	77.8	-3.6	2.11
The J.M. Smucker Co.	40.7	0.1	2.53
King Arthur Flour Co.	16.1	5.6	4.31
Bob's Red Mill Natural Foods	7.4	12.0	6.23

TOP BRANDS (MILLIONS)	\$ SALES	CHANGE VS.	SHARE
	YEAR AGO		
Gold Medal	\$172.7	-5.7%	24.7%
Private label	164.6	-5.4	23.5
King Arthur Flour	69.6	5.2	9.9
Pillsbury Best	59.1	2.4	8.5
Bob's Red Mill	46.3	17.1	6.6
White Lily	22.3	-3.4	3.2
Maseca	21.1	4.1	3.0
White Wings	13.8	1.3	2.0
Swan's Down	11.1	-1.0	1.6
Blue Bird	8.4	22.4	1.2
CATEGORY TOTAL	699.7	-0.2	100.0

TOP BRANDS (MILLIONS)	UNIT SALES	CHANGE VS.	AVG. PRICE
	YEAR AGO	PER UNIT	
Gold Medal	66.4	-6.1%	\$2.60
Private label	77.8	-3.6	2.11
King Arthur Flour	16.1	5.6	4.31
Pillsbury Best	23.5	2.4	2.51
Bob's Red Mill	17.4	12.1	6.24
White Lily	8.8	-1.6	2.51
Maseca	4.8	7.4	4.33
White Wings	2.8	0.5	4.81
Swan's Down	3.5	-4.0	3.10
Blue Bird	1.2	29.0	6.95
CATEGORY TOTAL	248.7	-1.7	2.81

TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25

Source: IRI

SPICE/SEASONING-NO SALT/PEPPER

Three of the top four brands were from category leader McCormick (33.6% dollar share). Private label was second with a 14.7% dollar share. The biggest brand gainer was Badia, up 16.3%. category sales totaled \$2.2 billion, up 3.6%. Units were up 3.4%.

The stat pool: the grocery headquarters annual State of the Industry Almanac takes a comprehensive look at dozens of supermarket categories; STATE OF THE INDUST....

\$ SALES CHANGE VS.
TOP VENDORS (MILLIONS) YEAR AGO SHARE

McCormick & Co.	\$741.3	1.4%	33.6%
Private label	324.0	0.7	14.7
ACH Food Cos.	174.0	3.3	7.9
B & G Foods	82.5	-1.9	3.7
Goya Foods	74.3	3.6	3.4

UNIT SALES CHANGE VS. AVG. PRICE
TOP VENDORS (MILLIONS) YEAR AGO PER UNIT

McCormick & Co.	248.9	4.7%	\$2.98
Private label	151.3	-1.3	2.14
ACH Food Cos.	46.4	1.2	3.75
B & G Foods	27.5	-2.8	3.00
Goya Foods	36.4	4.8	2.04

\$ SALES CHANGE VS.
TOP BRANDS (MILLIONS) YEAR AGO SHARE

McCormick	\$415.5	-1.7%	18.9%
Private label	324.0	0.7	14.7
McCormick Gourmet Collectn	120.7	-1.5	5.5
McCormick Grill Mates	100.5	3.2	4.6
Badia	69.2	16.3	3.1
Tones	67.7	0.2	3.1
Mrs. Dash	59.9	0.3	2.7
Spice Islands	58.0	0.6	2.6
Spice World	51.1	3.3	2.3
Sazon Goya	45.8	4.0	2.1
CATEGORY TOTAL	2,203.9	3.6	100.0

UNIT SALES CHANGE VS. AVG. PRICE
TOP BRANDS (MILLIONS) YEAR AGO PER UNIT

McCormick	115.7	-2.9%	\$3.59
Private label	151.3	-1.3	2.14
McCormick Gourmet Collectn	23.3	0.4	5.17
McCormick Grill Mates	37.7	0.2	2.66
Badia	31.7	14.9	2.18
Tones	17.8	-2.5	3.81
Mrs. Dash	20.9	-1.2	2.86
Spice Islands	10.9	-1.3	5.34
Spice World	17.5	-0.4	2.92
Sazon Goya	22.7	5.7	2.02
CATEGORY TOTAL	823.5	3.4	2.68

TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25.

Source: IRI

ICE CREAM

Blue Bell was the only national brand with double-digit dollar share (11.3%), second to private label (21.3%). Brands three through five, Haagen-Dazs,

The stat pool: the grocery headquarters annual State of the Industry Almanac takes a comprehensive look at dozens of supermarket categories; STATE OF THE INDUST....

Breyers and Ben & Jerry's, were separated by only 0.6%. Talenti enjoyed a big year, up 77.2%. Overall, category dollars were up 3.1% while units were up 1.2%.

\$ SALES CHANGE VS.

TOP VENDORS	(MILLIONS)	YEAR AGO	SHARE
Private label	\$1,069.4	-2.6%	21.3%
Nestle Dreyers Ice Cream Co.	927.5	-3.3	18.5
Blue Bell Creameries	570.0	5.6	11.3
Good Humor/Breyers	478.1	6.2	9.5
Ben & Jerry's Homemade	389.0	15.3	7.7

UNIT SALES CHANGE VS. AVG. PRICE

TOP VENDORS	(MILLIONS)	YEAR AGO	PER UNIT
Private label	331.6	-3.0%	\$3.23
Nestle Dreyers Ice Cream Co.	238.3	-3.7	3.89
Blue Bell Creameries	130.7	0.2	4.36
Good Humor/Breyers	129.0	1.9	3.71
Ben & Jerry's Homemade	100.7	12.6	3.86

\$ SALES CHANGE VS.

TOP BRANDS (MILLIONS)	YEAR AGO	SHARE
Private label	\$1,069.4	-2.6%
Blue Bell	570.0	5.6
Haagen-Dazs	382.2	4.5
Breyers	356.8	-5.1
Ben & Jerry's	349.9	3.7
Dreyer's/Edy's Slowchurned	263.4	-8.5
Dreyer's/Edy's Grand	232.6	-8.1
Turkey Hill	218.9	11.9
Talenti	164.9	77.2
Wells Blue Bunny	163.3	-32.6
CATEGORY TOTAL	5,026.2	3.1
		100.0

UNIT SALES CHANGE VS. AVG. PRICE

TOP BRANDS (MILLIONS)	YEAR AGO	PER UNIT
Private label	331.6	\$3.23
Blue Bell	130.7	0.2
Haagen-Dazs	93.2	3.9
Breyers	99.2	-6.3
Ben & Jerry's	90.5	1.2
Dreyer's/Edy's Slowchurned	69.2	-8.0
Dreyer's/Edy's Grand	62.5	-7.8
Turkey Hill	75.1	12.1
Talenti	37.7	74.2
Wells Blue Bunny	41.5	-26.4
CATEGORY TOTAL	1,351.1	1.2
		3.72

TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25.

Source: IRI

The stat pool: the grocery headquarters annual State of the Industry Almanac takes a comprehensive look at dozens of supermarket categories; STATE OF THE INDUST....

FZ YUGUKT/TOFU

Dannon Oikos made its way into the top 10, debuting at seven with more than \$16 million in sales, 5.1% market share. Top selling national brand Kemps did well, up 10.3% in dollars, as did No.2 So Delicious, up a more impressive 28.6%. Overall, the category was off, about 10% in both dollars and units.

TOP VENDORS	\$ SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE
Private label	\$64.3	-1.6%	20.2%
Ben & Jerry's Homemade	39.2	-26.9	12.3
Kemps	37.49.0	11.7	
Turtle Mountain	36.1	16.8	11.3
Wells Enterprises	26.7	-30.8	8.4

TOP VENDORS	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	AVG. PRICE PER UNIT
Private label	21.2	-1.7%	\$3.02
Ben & Jerry's Homemade	10.4	-30.5	3.78
Kemps	10.0	10.3	3.73
Turtle Mountain	6.9	18.5	5.20
Wells Enterprises	7.1	-34.4	3.75

TOP BRANDS	\$ SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE
Private label	\$64.3	-1.6%	20.2%
Kemps	34.5	10.3	10.8
So Delicious	26.5	28.6	8.3
Ben & Jerry's FroYo	23.4	-1.6	7.3
Wells Blue Bunny	23.01.8	7.2	
Healthy Choice	22.8	-37.3	7.1
Dannon Oikos	16.2	23,963.7	5.1
Ben & Jerry's	15.8	-47.0	5.0
Dreyer's/Edy's Slowchurned	10.8	-27.3	3.4
Haagen-Dazs9.1	-7.4	2.9	
CATEGORY TOTAL	318.8	-9.5	100.0

TOP BRANDS	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	AVG. PRICE PER UNIT
Private label	21.2	-1.7%	\$3.02
Kemps	9.3	11.7	3.72
So Delicious	5.1	30.7	5.15
Ben & Jerry's FroYo	6.1	-2.9	3.86
Wells Blue Bunny	5.92.6	3.89	
Healthy Choice	6.3	-41.8	3.59
Dannon Oikos	5.0	26461.6	3.25
Ben & Jerry's	4.3	-50.4	3.68
Dreyer's/Edy's Slowchurned	2.8	-26.4	3.90
Haagen-Dazs2.3	-7.8	4.00	
CATEGORY TOTAL	86.8	-11.1	3.67

TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET

The stat pool: the grocery headquarters annual State of the Industry Almanac takes a comprehensive look at dozens of supermarket categories; STATE OF THE INDUST....

RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS
FOR THE 52 WEEKS ENDED JANUARY 25.

Source: IRI

SHERBET/SORBET/ICES

Talenti was the big winner with a dollars increase of 54.4% and sales that reached nearly \$10 million. Blue Bell also fared well, up 9.9%. Leading national brand Haagen-Dazs had an off year, but still captured almost 14% of dollar sales. Private label still controls the category with more than 40% of dollars, though down 9%.

\$ SALES CHANGE VS.

TOP VENDORS	(MILLIONS)	YEAR AGO	SHARE
Private label	\$80.9	-9.0%	41.9%
Nestle Dreyers Ice Cream Co.	33.8	-9.0	17.5
Blue Bell Creameries	14.9	9.9	7.7
Talenti	9.8	54.4	5.1
Prairie Farms Dairy	6.2	5.5	3.2

UNIT SALES CHANGE VS. AVG. PRICE

TOP VENDORS	(MILLIONS)	YEAR AGO	PER UNIT
Private label	31.7	-9.8%	\$2.55
Nestle Dreyers Ice Cream Co.	8.6	-9.2	3.94
Blue Bell Creameries	5.2	4.2	2.89
Talenti	2.2	52.0	4.40
Prairie Farms Dairy	1.9	5.3	3.24

\$ SALES CHANGE VS.

TOP BRANDS (MILLIONS)	YEAR AGO	SHARE
Private label	\$80.9	-9.0%
Haagen-Dazs	26.8	13.9
Blue Bell	14.9	7.7
Talenti	9.8	5.1
Prairie Farms	6.2	3.2
Kemps	6.0	3.1
WholeFruit	4.3	2.2
Dean's Country Fresh	4.0	2.1
Dreyer's/Edys	3.9	2.0
Ciao Bella	3.4	1.7
CATEGORY TOTAL	193.2	100.0

UNIT SALES CHANGE VS. AVG. PRICE

TOP BRANDS (MILLIONS)	YEAR AGO	PER UNIT
Private label	31.7	\$2.55
Haagen-Dazs	6.8	3.94
Blue Bell	5.2	2.89
Talenti	2.2	4.40
Prairie Farms	1.9	3.23
Kemps	2.0	3.05
WholeFruit	1.5	2.85
Dean's Country Fresh	1.6	2.58
Dreyer's/Edys	1.0	3.89

The stat pool: the grocery headquarters annual State of the Industry Almanac takes a comprehensive look at dozens of supermarket categories; STATE OF THE INDUST....

Ciao Bella	0.8	-43.4	4.36
CATEGORY TOTAL		66.2	-7.0
			2.92

TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25.

Source: IRI

FROZEN PIZZA CRUSTS/DOUGH

After double-digit growth the year prior, sales flattened. However, most national brands did well including Udi's, up 11.5% in dollars for 24.7% market share, trailing only private label. Other brands that did well were Stefano's, Tiseo and Against the Grain Gourmet.

TOP VENDORS	\$ SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE
Private label	\$5.7	-5.2%	27.2%
Boulder Brands	5.1	11.5	24.7
Kinnikinnick Foods	1.4	-0.7	6.9
Stefano Foods	1.2	18.3	6.0
Score Tuesday	0.9	11.8	4.4

TOP VENDORS	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	AVG. PRICE PER UNIT
Private label	2.0	-3.9%	\$2.83
Boulder Brands	1.0	14.3	5.04
Kinnikinnick Foods	0.20.3	8.05	
Stefano Foods	0.6	15.7	1.99
Score Tuesday	0.55.3	1.89	

TOP BRANDS	\$ SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE
Private label	\$5.7	-5.2%	27.2%
Udi's	5.1	11.5	24.7
Kinnikinnick Foods	1.4	-0.7	6.9
Stefano's	1.2	18.3	6.0
Tiseo	0.9	11.8	4.4
Against the Grain Gourmet	0.8	54.8	3.7
Calise & Sons Bakery	0.7	9.5	3.3
Guttenplans	0.7	5.7	3.3
House of Pasta	0.6	-12.8	2.8
Original Pizza of Boston	0.4	22.5	2.0
CATEGORY TOTAL	20.8	0.3	100.0

TOP BRANDS	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	AVG. PRICE PER UNIT
Private label	2.0	-3.9%	\$2.83
Udi's	1.0	14.3	5.04
Kinnikinnick Foods	0.20.3	8.05	
Stefano's	0.6	15.7	1.99
Tiseo	0.55.3	1.89	

The stat pool: the grocery headquarters annual State of the Industry Almanac takes a comprehensive look at dozens of supermarket categories; STATE OF THE INDUST....

Against the Grain Gourmet	0.1	52.4	7.28
Calise & Sons Bakery	0.47.8	1.52	
Guttenplans	0.67.4	1.22	
House of Pasta	0.2	-15.2	2.77
Original Pizza of Boston	0.2	23.8	2.37
CATEGORY TOTAL	7.0	-0.6	2.95

TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25.

Source: IRI

FROZEN PIZZA

Di Giorno remained the No. 1 brand with dollars more than double No. 2, private label. Totino's Party Pizza, Red Baron and Tombstone round out the top five brands. Nestle was the top vendor, garnering 43.6% of dollars. Overall the category was flat in dollars, down 2.9% in units.

TOP VENDORS	\$ SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE
Nestle USA	\$1,907.6	-5.4%	43.6%
Schwan Food Co.	898.8	2.7	20.5
Private label	463.7	5.0	10.6
General Mills	409.2	6.6	9.3
Bernatello's Pizza	78.7	24.7	1.8

TOP VENDORS	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	Avg. Price PER UNIT
Nestle USA	435.2	-7.5%	\$4.38
Schwan Food Co.	246.8	-5.5	3.64
Private label	147.8	1.6	3.14
General Mills	304.5	4.3	1.34
Bernatello's Pizza	20.6	4.5	3.83

TOP BRANDS	\$ SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE
Di Giorno	\$957.3	-7.7%	21.9%
Private label	463.7	5.0	10.6
Totino's Party Pizza	387.7	7.2	8.9
Red Baron	380.3	2.7	8.7
Tombstone	308.9	-0.5	7.1
Freschetta	222.7	19.9	5.1
Jack's	194.3	63.2	4.4
Red Baron Singles	152.6	6.6	3.5
California Pizza Kitchen	138.4	1.9	3.2
Di Giorno Pizzeria	89.2	9.3	2.0
CATEGORY TOTAL	4,377.1	0.0	100.0

TOP BRANDS	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	Avg. Price PER UNIT
Di Giorno	170.4	-9.4%	\$5.62

The stat pool: the grocery headquarters annual State of the Industry Almanac takes a comprehensive look at dozens of supermarket categories; STATE OF THE INDUST....

Private label	147.8	1.6	3.14	
Totino's Party Pizza		286.7	5.3	1.35
Red Baron	105.8	-0.3	3.59	
Tombstone	83.3	-2.1	3.71	
Freschetta	42.7	15.7	5.21	
Jack's	63.4	61.6	3.07	
Red Baron Singles	44.3	7.0	3.45	
California Pizza Kitchen		26.2	-2.0	5.27
Di Giorno Pizzeria	15.6	5.4	5.73	
CATEGORY TOTAL	1,342.7	-2.9	3.26	

TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25.

Source: IRI

REFRIGERATED BACON

Bacon sales are sizzling. Dollar sales are up 7.2%, climbing past the \$4 billion mark. Unit sales are also up a healthy 3.2%. Private label is the top selling vendor and brand. Of the national brands, Oscar Mayer is No. 1 followed by Hormel Black label. The biggest gainer was Smithfield, up 34.6%.

\$ SALES TOP VENDORS (MILLIONS)	CHANGE VS. YEAR AGO	SHARE
Private label \$948.9	11.9%	21.6%
Kraft Foods Group	904.0	4.4
Hormel Foods	485.3	11.1
Wright Brand Foods	341.0	5.5
Smithfield	228.0	7.8
35.8	5.2	

UNIT SALES TOP VENDORS (MILLIONS)	CHANGE VS. YEAR AGO	AVG. PRICE PER UNIT
Private label 207.9	6.8%	\$4.56
Kraft Foods Group	181.5	1.3
Hormel Foods	83.0	4.98
Wright Brand Foods	-7.0	5.85
Smithfield	32.6	-1.6
53.7	32.8	10.47
		4.24

\$ SALES TOP BRANDS (MILLIONS)	CHANGE VS. YEAR AGO	SHARE
Private label \$948.9	11.9%	21.6%
Oscar Mayer 854.8	2.6	19.5
Hormel Black Label	366.3	0.7
Wright	334.1	8.3
Smithfield	210.0	4.9
Farmland	207.2	4.8
Gwaltney	96.1	7.2
Hormel	92.8	4.7
BarS87.4	-16.3	2.2
Butterball Everyday	2.0	2.1
71.6	3.8	1.6
CATEGORY TOTAL	4,387.8	100.0

The stat pool: the grocery headquarters annual State of the Industry Almanac takes a comprehensive look at dozens of supermarket categories; STATE OF THE INDUST....

UNIT SALES TOP BRANDS	CHANGE VS. (MILLIONS)	AVG. PRICE YEAR AGO	PER UNIT
Private label	207.9	6.8%	\$4.56
Oscar Mayer	169.7	-1.4	5.04
Hormel Black Label	60.0	-6.9	6.10
Wright	32.2	-2.0	10.36
Smithfield	47.5	31.2	4.42
Farmland	44.7	4.4	4.63
Gwaltney	25.2	-3.2	3.81
Hormel	18.5	-7.1	5.01
BarS	23.8	-21.9	3.68
Butterball Everyday	32.5	2.7	2.20
CATEGORY TOTAL	926.7	3.2	4.73

TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25.

Source: IRI

BROWN/POWDER/FLAVORED SUGAR

Just about half the category belongs to private label (49%), though that was down 6.5% for the year. The top national brand was Domino with 24.3% of dollars, flat for the year. C&H Brown was the only other brand with significant market share, 14.6%, down 2.1%.

TOP VENDORS	\$ SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE
Private label	\$187.2	-6.5%	49.0%
Domino Foods	92.9	0.0	24.3
C & H Sugar Co.	55.8	-2.0	14.6
Imperial Sugar Co.	20.0	5.1	5.2
Amer Crystal Sugar Co.	6.5	0.3	1.7

TOP VENDORS	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	AVG. PRICE PER UNIT
Private label	111.0	-2.5%	\$1.69
Domino Foods	55.6	-1.9	1.67
C & H Sugar Co.	29.2	-1.4	1.91
Imperial Sugar Co.	13.3	9.8	1.50
Amer Crystal Sugar Co.	3.3	3.4	1.95

TOP BRANDS	\$ SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE
Private label	\$187.2	-6.5%	49.0%
Domino	92.9	0.0	24.3
C&H	55.7	-2.1	14.6
Imperial Sugar	10.2	3.6	2.7
Dixie Crystals	9.5	6.9	2.5
Florida Crystals	5.8	11.2	1.5
Crystal Sugar	4.4	-0.7	1.2
American Crystal	2.0	2.3	0.5

The stat pool: the grocery headquarters annual State of the Industry Almanac takes a comprehensive look at dozens of supermarket categories; STATE OF THE INDUST....

Wholesome Sweeteners	1.7	43.6	0.5
Batey	1.7	8.2	0.5
CATEGORY TOTAL	382.2	-2.7	100.0
UNIT SALES CHANGE VS. AVG. PRICE			
TOP BRANDS	(MILLIONS)	YEAR AGO	PER UNIT
Private label	111.0	-2.5%	\$1.69
Domino	55.6	-1.9	1.67
C&H	29.2	-1.4	1.91
Imperial Sugar	6.3	7.5	1.61
Dixie Crystals	6.9	12.3	1.39
Florida Crystals	1.6	11.2	3.63
Crystal Sugar	2.2	2.8	1.96
American Crystal	1.0	4.7	1.94
Wholesome Sweeteners	.3	46.2	4.43
Batey	.4	9.3	4.10
CATEGORY TOTAL	220.5	-0.9	1.73

TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25.

Source: IRI

CANNED/BOTTLED CORN

Del Monte Foods was the top national vendor with 24.8% of dollar sales on the strength of three brands in the top 10. Seneca Foods' Libby's had a good year, up 10% in dollars. Overall category dollars were down 2.3%, units down 0.2%.

TOP VENDORS	\$ SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE
Private label	\$227.2	-2.1%	36.4%
Del Monte Foods	154.9	-8.0	24.8
General Mills	102.9	-2.1	16.5
Seneca Foods Corp.	50.5	11.3	8.1
Juanita's Foods	25.5	6.0	4.1
TOP VENDORS	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	AVG. PRICE PER UNIT
Private label	332.0	-2.8%	\$0.68
Del Monte Foods	136.6	2.1	1.13
General Mills	87.8	-6.5	1.17
Seneca Foods Corp.	67.2	27.3	0.75
Juanita's Foods	10.5	4.7	2.42
TOP BRANDS	\$ SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE
Private label	\$227.2	-2.1%	36.4%
Del Monte Fresh Cut	106.9	-5.2	17.1
Green Giant	88.8	-2.4	14.2

The stat pool: the grocery headquarters annual State of the Industry Almanac takes a comprehensive look at dozens of supermarket categories; STATE OF THE INDUST....

Libby's	44.7	10.0	7.2
Del Monte	35.2	7.8	5.6
Juanita's	21.1	8.8	3.4
Bush's Best	13.9	4.3	2.2
Green Giant Mexicorn	9.3	-9.3	1.5
Del Monte Fresh Cut Specialties		8.0	-53.3
Teasdale	6.8	-3.8	1.1
CATEGORY TOTAL	624.5	-2.3	100.0

TOP BRANDS	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	AVG. PRICE PER UNIT
Private label	332.0	-2.8%	\$0.68
Del Monte Fresh Cut	114.8	4.2	0.93
Green Giant	79.3	-7.0	1.12
Libby's	60.6	26.9	0.74
Del Monte	11.8	65.4	2.98
Juanita's	7.5	9.0	2.81
Bush's Best	8.3	3.7	1.67
Green Giant Mexicorn	6.1	-10.9	1.53
Del Monte Fresh Cut Specialties		5.3	-53.3
Teasdale	2.9	-2.5	2.34
CATEGORY TOTAL	687.2	-0.2	0.91

TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25.

Source: IRI

CANNED/BOTTLED GREEN BEANS

The Green Giant was jolly, up a healthy 15% in dollars for General Mills. Del Monte Fresh Cut was the top national brand with 21.1% of dollars, trailing private label (36.3%). The category generated more than \$600 million, down 1.6%. Units were up 0.7%.

TOP VENDORS	\$ SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE
Private label	\$218.9	-1.7%	36.3%
Del Monte Foods	203.9	-6.4	33.8
General Mills	54.5	11.9	9.0
Seneca Foods Corp.	44.5	5.7	7.4
Allens	27.4	-7.6	4.5

TOP VENDORS	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	AVG. PRICE PER UNIT
Private label	310.8	-2.6%	\$0.70
Del Monte Foods	165.3	4.2	1.23
General Mills	50.3	-3.7	1.08
Seneca Foods Corp.	59.7	24.0	0.75
Allens	17.2	-19.2	1.59

TOP BRANDS	\$ SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE
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The stat pool: the grocery headquarters annual State of the Industry Almanac takes a comprehensive look at dozens of supermarket categories; STATE OF THE INDUST....

Private label	\$218.9	-1.7%	36.3%	
Del Monte Fresh Cut	127.0	-10.5	21.1	
Del Monte	55.9	4.8	9.3	
Green Giant	44.0	15.0	7.3	
Libby's	39.0	5.1	6.5	
The Allens	23.3	-4.8	3.9	
Hanover	18.2	4.5	3.0	
Del Monte Fresh Cut Specialties		17.4	-23.3	2.9
Glory foods	11.0	10.3	1.8	
Green Giant Kitchen Sliced	9.8	-3.4	1.6	
CATEGORY TOTAL	602.8	-1.6	100.0	

TOP BRANDS	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	AVG. PRICE PER UNIT	
Private label	310.8	-2.6%	\$0.70	
Del Monte Fresh Cut	133.8	1.6	0.95	
Del Monte	18.6	53.7	3.01	
Green Giant	38.8	-3.7	1.13	
Libby's	53.9	25.0	0.72	
The Allens	12.8	-16.2	1.82	
Hanover	8.4	4.9	2.17	
Del Monte Fresh Cut Specialties		11.5	-22.8	1.51
Glory foods	5.7	16.6	\$1.95	
Green Giant Kitchen Sliced	10.9	-5.9	0.89	
CATEGORY TOTAL	644.9	0.7	0.93	

TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25.

Source: IRI

BAGELS/BIALYS

It was a strong year for No. 1 brand Thomas. The Orograin Bakeries brand was up 7.2% in dollars, capturing nearly half of all category sales. Udi's also performed well, up 22.4%. Overall the category was up 1.9% in dollars, 3.8% units.

TOP VENDORS	\$ SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE
Orograin Bakeries Products	\$519.3	4.3%	60.7%
Private label	133.9	4.4	15.6
EarthGrains Baking Cos.	79.4	-11.1	9.3
Pepperidge Farm	24.4	-12.6	2.9
Flowers Foods Bakeries	21.9	-11.1	2.6

TOP VENDORS	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	AVG. PRICE PER UNIT
Orograin Bakeries Products	160.7	5.5%	\$3.23
Private label	62.2	6.3	2.15
EarthGrains Baking Cos.	28.1	-5.1	2.82
Pepperidge Farm	5.9	-11.7	4.11

The stat pool: the grocery headquarters annual State of the Industry Almanac takes a comprehensive look at dozens of supermarket categories; STATE OF THE INDUST....

Flowers Foods Bakeries 8.1 -7.4 2.71

-7.4 2.71

\$ SALES		CHANGE VS.		
TOP BRANDS	(MILLIONS)	YEAR AGO	SHARE	PERCENT

Thomas	\$419.6	7.2%	49.0%	
Private label	133.9		4.4	15.6
Sara Lee	75.4	-10.0	8.8	
Thomas Bagel Thins	73.6		-2.6	8.6
Thomas Hearty Grains	25.7		-11.8	3.0
Nature's Own	21.9		-10.9	2.6
Pepperidge Farm Mini	13.2		-3.2	1.5
Udi's	11.8	22.4	1.4	
Pepperidge Farm	11.2		-21.5	1.3
Franz	11.0	5.9	1.3	

CATEGORY TOTAL 856.0 1.9 100.0

UNIT SALES	CHANGE VS.	AVG. PRICE
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Thomas	128.5	8.1%	\$3.26
Private label	62.2	6.3	2.15
Sara Lee	26.9	-4.2	2.80
Thomas Bagel Thins	24.3	-0.3	3.03
Thomas Hearty Grains	7.7	-11.0	3.33
Nature's Own	8.1	-7.2	2.71
Pepperidge Farm Mini	3.2	-2.3	4.09
Udi's	2.2	21.7	5.45
Pepperidge Farm	2.7	-20.8	4.14

TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS

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Fresh bread is one of the top selling categories in the store with sales approaching \$9 billion. Store brands were the only one to reach double-digits, with 23.9% of dollar sales. Pepperidge Farm had a good year with two of its brands showing solid growth.

§ SALES CHANGE VS.
TOP VENDORS (MILLIONS) YEAR AGO SHARE

Private label	\$2,138.8	-3.7%	23.9%	
Flowers Foods Bakeries	1,519.1		6.9	17.0
EarthGrains Baking Cos.	819.4		-5.0	9.2
Bimbo Bakeries USA	691.1	-0.1	7.7	
Pepperidge Farm	665.3	1.3	7.4	

UNIT SALES	CHANGE VS.	AVG. PRICE
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The stat pool: the grocery headquarters annual State of the Industry Almanac takes a comprehensive look at dozens of supermarket categories; STATE OF THE INDUST....

Private label	1,395.2	-2.0%	\$1.53
Flowers Foods Bakeries	569.9	8.3	2.67
EarthGrains Baking Cos.	328.4	-2.2	2.50
Bimbo Bakeries USA	240.4	1.1	2.88
Pepperidge Farm	197.0	1.3	3.38

TOP BRANDS	\$ SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE
Private label	\$2,138.8	-3.7%	23.9%
Nature's Own	838.7	-1.9	9.4
Brownberry	369.8	-10.3	4.1
Sara Lee	336.5	0.2	3.8
Oroweat	331.4	-4.3	3.7
Pepperidge Farm	215.9	4.8	2.4
Sunbeam	185.3	-8.1	2.1
Pepperidge Farm Swirl	172.6	-0.9	1.9
Pepperidge Farm Farmhouse	131.6	8.2	1.5
Mrs. Baird's	112.3	-7.2	1.3
CATEGORY TOTAL	8,942.3	-0.8	100.0

TOP BRANDS	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	AVG. PRICE PER UNIT
Private label	1,395.2	-2.0%	\$1.53
Nature's Own	302.6	-1.4	2.77
Brownberry	129.6	-9.7	2.85
Sara Lee	137.8	4.1	2.44
Oroweat	95.6	-4.2	3.47
Pepperidge Farm	64.1	5.4	3.37
Sunbeam	74.5	-9.6	2.49
Pepperidge Farm Swirl	52.6	-0.7	3.28
Pepperidge Farm Farmhouse	40.1	9.0	3.28
Mrs. Baird's	49.4	-5.2	2.27
CATEGORY TOTAL	3,899.6	-0.3	2.29

TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25.

Source: IRI

DOUGHNUTS

Doughnuts remain popular with consumers. Category dollars were up 7%, units up 7.6%. Hostess Donettes rebounded nicely, nearly doubling dollar sales, for a 10.7% market share, good for 5th best selling brand. Tastykake also had a strong year, up 18.4% in dollars.

TOP VENDORS	\$ SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE
Private label	\$330.1	7.5%	26.4%
Bimbo Bakeries USA	288.8	-1.3	23.1
Krispy Kreme Doughnut Co.	163.3	-1.2	13.1
McKee Foods Corp.	143.1	12.3	11.4
Hostess Brands	133.9	99.3	10.7

The stat pool: the grocery headquarters annual State of the Industry Almanac takes a comprehensive look at dozens of supermarket categories; STATE OF THE INDUST....

TOP VENDORS	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	AVG. PRICE PER UNIT
Private label	117.5	-0.9%	\$2.81
Bimbo Bakeries USA	92.9	-1.4	3.11
Krispy Kreme Doughnut Co.	39.1	-4.7	4.18
McKee Foods Corp.	84.4	8.2	1.70
Hostess Brands	74.4	102.1	1.80

TOP BRANDS	\$ SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE
Private label	\$330.1	7.5%	26.4%
Entenmann's	174.0	-0.2	13.9
Krispy Kreme	153.6	-0.9	12.3
Little Debbie	142.4	11.8	11.4
Hostess Donettes	133.8	99.6	10.7
Tastykake	59.4	18.4	4.7
Entenmann's Soltees	56.7	-0.9	4.5
Entenmann's Popems	37.1	-0.6	3.0
Duchess	18.0	-12.9	1.4
Nobrand	13.9	-0.9	1.1
CATEGORY TOTAL	1,250.1	7.0	100.0

TOP BRANDS	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	AVG. PRICE PER UNIT
Private label	117.5	-0.9%	\$2.81
Entenmann's	55.4	-0.2	3.14
Krispy Kreme	35.9	-4.0	4.27
Little Debbie	84.1	7.8	1.69
Hostess Donettes	74.4	102.5	1.80
Tastykake	32.4	26.2	1.83
Entenmann's Soltees	14.1	-1.3	4.02
Entenmann's Popems	12.5	-1.0	2.98
Duchess	3.7	-20.6	4.92
Nobrand	4.5	-0.7	3.12
CATEGORY TOTAL	486.2	7.6	2.57

TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25.

Source: IRI

Load-Date: May 5, 2015

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**The stat pool: the grocery headquarters annual State of the Industry
Almanac takes a comprehensive look at dozens of supermarket
categories.(STATE OF THE INDUSTRY ALMANAC 2015)**

Grocery Headquarters

April 1, 2015

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Section: Pg. 60; Vol. 81; No. 4; ISSN: 1094-1088

Length: 21479 words

Body

What do consumers want?

That is the \$64,000 question. Figuring it out can mean the difference between swimming in the green or drowning in red ink. In an effort to supply a little bit of clarity, each year the editors at Grocery Headquarters dive head first into a pool of numbers.

Grocery Headquarters' State of the Industry Almanac, published in conjunction with Chicago-based market research firm IRI, provides the top 10 brands and five best-selling vendors in a wide array of categories covering every aisle of the store. Sales figures are for the 52-week period ended January 25.

While there are never any guarantees, there certainly are some smart bets for retailers to make. Alcohol is one of them.

The beer/alcohol/cider category and wine category, third and seventh best selling categories respectively, were up in both dollars and units for the tracked period. Beer sales were at \$9.7 billion, up 3.7%, while wine pushed past the \$7 billion mark, up 4.4%. Lower down on the top 50 list, spirits/liquor (27th) sales were up 3.1% in dollars, topping \$3 billion and up 2.5% in units.

"We are amazed at how well alcohol has performed at our chain over the last few years," says a Midwest retailer, who adds that his operation is allotting more space than ever for spirits. "Consumers make it clear that they want convenience when shopping and that extends to the alcoholic beverage market."

And what goes better with beer and wine than salty snacks and cheese?

Salty snacks was the fourth best selling category with sales of more than \$9.5 billion, up almost 3%, units were up 2.6%. Two spots below salty snacks and one spot above wine was natural cheese. The category was up 7% in dollars, for \$7.1 billion in sales and up 1% in units.

After a night of indulgence, or overindulgence, what are consumers in need of? Coffee and bottled water of course. Just outside the top 10, in 11th and 12th respectively, both had good years as well. Each accounted for \$4.7 billion in sales, up 5.4% and 5.3% in dollars and 5.3% (coffee) and 3.4% (water) in units.

Other categories that had strong years in both dollars and units included refrigerated salad/coleslaw (dollars up 10.1%, units up 8.3%) and refrigerated meat (dollars up 22.3%, units up 8.7%).

The stat pool: the grocery headquarters annual State of the Industry Almanac takes a comprehensive look at dozens of supermarket categories.(STATE OF THE INDUST....

Of course it was not all candy and roses, (except in the candy and floral departments), as there were some categories that underperformed, none bigger than the carbonated beverage segment. It may be a reach to say a category that was the top selling in the store, generating almost \$11 billion in sales, was a disappointment, but carbonated beverages were down once again, about 2% for both units and dollars.

"It's like watching a long lost friend go away," says the same Midwest retailer. "Consumers want so many different options in the beverage category and each new innovation just takes a little bit more away from carbonated beverages. The interesting part of all of this is that Coca-Cola and Pepsi are the leaders in these other segments as well."

Other categories to have off years were eighth-best cold cereal, down 4% in dollars and 3.5% in units, ninth-best frozen dinners and entrees (-3.5%, -5.7%) and laundry detergent (-3.5%, -2.9%).

As always, we encourage you to review our annual almanac and share your thoughts. We welcome your feedback.

--WRITTEN AND DEVELOPED BY THE GROCERY HEADQUARTERS EDITORIAL STAFF--

TOP 50 SUPERMARKET CATEGORIES \$ SALES CHANGE VS. UNIT SALES CHANGE VS. CATEGORY (MILLIONS) YEAR AGO (MILLIONS) YEAR AGO Carbonated \$10,922.8 -1.9% 4,876.0 -2.1% beverages Milk 10,855.4 2.9 3,445.3 -2.9 Beer/ale/alcoholic 9,721.7 3.7 1,104.6 3.4 cider Salty snacks 9,581.7 2.9 3,842.6 2.6 Fresh bread & 9,484.6 -0.3 4,069.3 -0.9 rolls Natural cheese 8,847.2 7.0 2,589.9 1.0 Wine 7,172.0 4.4 764.2 2.2 Cold cereal 5,354.6 -4.0 1,720.7 -3.5 Frozen dinners/ 5,184.4 -3.5 1,898.7 -5.7 entrees Yogurt 5,153.6 3.2 3,934.6 0.1 Coffee 4,751.7 5.4 747.1 5.3 Bottled water 4,740.7 5.3 2,427.1 3.4 Ice cream/sherbet 4,319.2 0.9 1,197.5 -0.6 Crackers 4,250.9 0.3 1,615.4 0.8 Refrigerated 4,183.3 -2.9 1,410.2 -5.4 juices/drinks Breakfast meats 4,110.2 8.4 973.6 2.2 Cookies 4,072.7 0.2 1,548.9 0.1 Refrigerated 4,068.2 10.9 1,538.1 -0.1 fresh eggs Soup 3,813.5 -0.8 2,840.0 -2.1 Cigarettes 3,797.9 -0.6 518.0 -0.9 Luncheon meats 3,501.1 3.1 1,109.0 -1.5 Total chocolate 3,494.9 2.7 1,736.7 -1.1 candy Refrigerated 3,472.2 10.1 1,244.8 8.3 salad/coleslaw Bottled juices--ss 3,163.3 -1.8 1,350.6 -2.4 Toilet tissue 3,099.8 -0.2 565.8 -2.0 Dog food 3,069.5 -0.8 817.4 -1.2 Spirits/liquor 3,031.9 3.1 198.1 2.5 Frozen pizza 2,825.2 -0.1 873.3 -3.5 Frozen novelties 2,669.5 -0.1 814.8 -2.8 Frozen/ 2,553.6 8.5 452.4 6.9 refrigerated poultry Frozen seafood 2,516.1 3.3 317.4 -4.2 Snack bars/ 2,435.0 3.1 1,052.0 3.0 granola bars Dinner sausage 2,307.2 8.8 592.5 1.5 Vegetables 2,262.3 -1.1 2,197.5 -0.8 Spices/ seasonings 2,233.6 2.4 852.1 0.9 Laundry detergent 2,220.8 -3.5 347.8 -2.9 Creams/creamers 2,193.0 5.4 767.0 1.1 Shortening & oil 2,161.8 -0.5 477.9 0.8 Baby formula/ 2,069.7 0.3 134.3 -3.4 electrolytes Cat food 2,068.4 -0.1 1,435.9 -0.3 Processed cheese 1,996.7 0.1 564.2 -6.5 Paper towels 1,893.9 0.1 472.1 -2.7 Snack nuts/seeds/ 1,889.9 4.6 17.2 3.4 corn nuts Refrigerated meat 1,872.9 22.3 278.0 8.7 Butter/butter 1,851.3 14.3 553.6 -2.2 blends Mexican foods 1,801.5 2.9 852.0 3.4 Frozen plain 1,799.7 0.0 1,068.9 0.2 vegetables Processed frzen/ 1,781.2 1.6 319.1 -1.9 refrig poultry Pastry/doughnuts 1,756.3 4.1 644.0 4.2 Refrigerated side 1,713.8 7.7 444.0 2.7 dishes 52 WEEKS ENDED JANUARY 25. Source: IRI DOMESTIC BEER Consumers still have a thirst for domestic beer. Sales topped \$ 10.5 billion, up 3.2% versus last year. The increase can be attributed to a higher average price per case (\$ 19.85) as case sales were relatively flat, (up 0.7%).Top brands remain Bud Light, Coors Light and Miller Lite capturing market share of 19.1%, 9.7% and 8.2% respectively. \$ SALES CHANGE VS. \$ CHANGE VS. TOP BRANDS (MILLIONS) YEAR AGO SHARE YEAR AGO Bud Light \$2,010.2 2.2% 19.1% -0.2% Coors Light 1,030.4 -1.5 9.7 -0.4 Miller Lite 862.6 1.3 8.2 -0.2 Budweiser 718.7 -1.5 6.8 -0.3 Michelob Ultra Light 428.2 11.1 4.0 0.2 Natural Light 343.8 -1.8 3.2 -0.2 Busch Light 318.5 1.3 3.0 -0.1 Busch 195.7 -0.8 1.8 -0.1 Miller High Life 195.5 -1.1 1.8 -0.1 Keystone Light 171.3 -5.4 1.6 -0.2 Blue Moon Belgian 147.6 4.0 1.4 0.0 White Ale Yuengling Traditional 136.2 8.2 1.3 0.1 Lager Pabst Blue Ribbon 131.1 1.5 1.2 0.0 Bud Light Lime 127.5 -6.0 1.2 -0.1 Bud Light Platinum 111.2 -16.9 1.0 -0.2 Lager Coors 109.6 6.1 1.0 0.0 Samuel Adams Seasonal 108.2 6.2 1.0 0.0 Natural Ice 100.1 0.6 0.9 0.0 Redds Apple Ale 82.2 9.6 0.7 0.1 Sierra Nevada Pale Ale 77.9 4.3 0.7 0.0 TOTAL 10,521.9 3.2 100.0 0.0 CASES CHANGE VS. AVG. PRICE TOP BRANDS (MILLIONS) YEAR AGO PER CASE Bud Light 108.8 1.2% \$18.47 Coors Light 55.8 -2.3 18.44 Miller Lite 47.1 0.5 18.31 Budweiser 38.9 -2.4 18.46 Michelob Ultra Light 18.6 9.6 22.98 Natural Light 23.5 -3.0 14.60 Busch Light 22.2 0.6 14.31 Busch 13.3 -1.7 14.71 Miller High Life 12.9 -2.6 15.08 Keystone Light 12.3 -6.5 13.87 Blue Moon Belgian 4.9 2.8 29.84 White Ale Yuengling Traditional 6.7 8.3 20.33 Lager Pabst Blue Ribbon 8.3 0.0 15.73 Bud Light Lime 5.1 -6.5 24.83 Bud Light Platinum 4.4 -18.6 24.88 Lager

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Coors 5.9 4.1 18.41 Samuel Adams Seasonal 3.4 4.4 31.31 Natural Ice 6.9 0.1 14.32 Redds Apple Ale 2.7 10.8 29.76 Sierra Nevada Pale Ale 2.4 3.6 31.20 TOTAL 530.1 0.7 19.85 TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25. Source: IRI IMPORTED BEER Dollar and case sales of imported beer were both up, 4.5% and 3.2% respectively, signifying consumers' willingness to pay a premium for the category. Third best selling brand, Modelo Especial was the rising star with sales up 23%. Dos Equis XX enjoyed the second most growth of brands in the top 10 with an increase of 16.3%. Corona Extra (23% market share) and Heineken (13.4%) were the top selling brands. \$ SALES CHANGE VS. \$ CHANGE VS. TOP BRANDS (MILLIONS) YEAR AGO SHARE YEAR AGO Corona Extra \$626.0 4.1% 23.3% -0.1% Heineken 361.9 2.7 13.4 -0.2 Modelo Especial 280.4 23.0 10.4 1.5 Corona Light 177.8 3.1 6.6 -0.1 Stella Artois Lager 159.7 10.7 5.9 0.3 Dos Equis XX Lager 146.6 16.3 5.4 0.5 Especial Tecate 87.6 -3.7 3.2 -0.3 Guinness Draught 57.5 -1.6 2.1 -0.1 Pacifico 49.8 1.9 1.8 -0.1 Newcastle Brown Ale 45.9 -14.9 1.7 -0.4 Heineken Premium 44.2 -10.3 1.6 -0.2 Light Lager Becks 43.7 7.3 1.6 0.0 Labatt Blue 40.0 -5.3 1.5 -0.2 Labatt Blue Light 36.2 -3.4 1.4 -0.1 Negra Modelo 33.4 6.9 1.3 0.0 Dos Equis XX Ambar 29.7 3.1 1.1 0.0 Lager Tecate Light 29.2 42.1 1.1 0.3 Guinness Extra Stout 28.5 7.1 1.1 0.0 Fosters Lager 27.3 -11.9 1.0 -0.2 Beers of Mexico 25.4 4.8 0.9 0.0 Variety Pack TOTAL \$2,685.6 4.5 100.0 0.0 CASES CHANGE VS. AVG. PRICE TOP BRANDS (MILLIONS) YEAR AGO PER CASE Corona Extra 22.4 2.1% \$27.94 Heineken 13.0 1.7 27.63 Modelo Especial 10.8 19.6 25.78 Corona Light 6.3 1.2 28.10 Stella Artois Lager 4.7 9.7 33.64 Dos Equis XX Lager 5.2 15.8 27.80 Especial Tecate 4.9 -5.0 17.89 Guinness Draught 1.6 -3.2 34.56 Pacifico 1.8 -0.4 27.44 Newcastle Brown Ale 1.5 -15.9 30.17 Heineken Premium 1.5 -11.1 27.95 Light Lager Becks 1.7 13.8 25.57 Labatt Blue 2.2 -5.5 18.17 Labatt Blue Light 2.0 -3.7 17.33 Negra Modelo 1.1 5.3 29.45 Dos Equis XX Ambar 1.0 2.9 27.73 Lager Tecate Light 1.7 39.0 17.19 Guinness Extra Stout .818 7.5 34.86 Fosters Lager 1.1 -12.4 23.91 Beers of Mexico .992 3.2 25.65 Variety Pack TOTAL 98.8 3.2 27.16 TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25. Source: IRI READY-TO-EAT CEREAL Of the top five manufacturers, only Post was able to improve dollar sales, up almost 2%. Consumers seemed to be looking for something sweet as Cinnamon Toast Crunch and Froot Loops were the top gaining brands, up 7.6% and 4.9% respectively. Honey Bunches of Oats was also up 4.9%. \$ SALES CHANGE VS. TOP VENDORS (MILLIONS) YEAR AGO SHARE General Mills \$2,712.6 -3.4% 30.4% Kellogg Co. 2,655.6 -5.4 29.8 Post Holdings 1,005.0 1.9 11.3 Private label 760.3 -5.0 8.5 Mom Brands 592.1 -10.3 6.6 UNIT SALES CHANGE VS. AVG. PRICE TOP VENDORS (MILLIONS) YEAR AGO PER UNIT General Mills 828.1 -2.8% \$3.28 Kellogg Co. 821.5 -4.1 3.23 Post Holdings 308.3 -2.1 3.26 Private label 305.8 -5.4 2.49 Mom Brands 163.7 -8.9 3.62 \$ SALES CHANGE VS. TOP BRANDS (MILLIONS) YEAR AGO SHARE Private label \$760.3 -5.0% 8.5% General Mills Hny Nt Cheerios 491.5 -6.2 5.5 Kellogg's Frosted Flakes 425.8 -4.3 4.8 Post Honey Bunches of Oats 393.8 4.9 4.4 General Mills Cheerios 355.9 4.3 4.0 General Mills Cinn Tst Crnch 326.0 7.6 3.7 Kellogg's Frosted Mini Wheats 263.4 -5.5 3.0 Kellogg's Froot Loops 261.2 4.9 2.9 General Mills Lucky Charms 256.2 -5.5 2.9 Kellogg's Raisin Bran 180.5 -0.5 2.0 CATEGORY TOTAL 8,914.0 -3.8 100.0 UNIT SALES CHANGE VS. AVG. PRICE TOP BRANDS (MILLIONS) YEAR AGO PER UNIT Private label 305.8 -5.4% \$2.49 General Mills Hny Nt Cheerios 142.3 -3.4 3.45 Kellogg's Frosted Flakes 130.4 -2.2 3.26 Post Honey Bunches of Oats 118.3 2.8 3.33 General Mills Cheerios 110.7 4.2 3.21 General Mills Cinn Tst Crnch 97.6 7.8 3.34 Kellogg's Frosted Mini Wheats 77.2 -5.4 3.41 Kellogg's Froot Loops 86.5 7.4 3.02 General Mills Lucky Charms 79.0 -3.0 3.24 Kellogg's Raisin Bran 53.6 -2.3 3.36 CATEGORY TOTAL 2,786.6 -3.7 3.20 TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25. Source: IRI HOT CEREAL/OATMEAL It was a good year for the category. Dollar sales were up 4%, topping \$1.3 billion while units were also up, 3.2%. Top brand Quaker lengthened its lead, up almost 7% for a dollar share of 45.2%. Store brands held the second spot, with 23.9% of dollars, though down 2.5%. \$ SALES CHANGE VS. TOP VENDORS (MILLIONS) YEAR AGO SHARE Quaker Oats Co. \$749.9 5.6% 57.6% Private label 310.5 -2.5 23.9 B & G Foods 73.9 -2.8 5.7 Bob's Red Mill Natural Foods 29.0 15.4 2.2 Red Engine Foods 20.7 1.6 1.6 UNIT SALES CHANGE VS. AVG. PRICE TOP VENDORS (MILLIONS) YEAR AGO PER UNIT Quaker Oats Co. 258.5 8.6% \$2.90 Private label 148.2 -3.9 2.09 B & G Foods 20.7 -3.0 3.57 Bob's Red Mill Natural Foods 6.4 11.8 4.54 Red Engine Foods 8.6 -34.7 2.40 \$ SALES CHANGE VS. TOP BRANDS (MILLIONS) YEAR AGO SHARE Quaker \$588.1 6.9% 45.2% Private label 310.5 -2.5 23.9 Cream of Wheat 68.6 -1.3 5.3 Quaker Real Medleys 44.1 0.2 3.4 Quaker Lower Sugar 41.5 0.2 3.2 Bob's Red Mill 29.0 15.4 2.2 Quaker

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High Fiber 23.6 -10.9 1.8 Quaker Weight Control 21.9 -9.3 1.7 Kellogg's Special K Nourish 18.3 51.6 1.4 Better Oats Oat Revolution 12.2 11.6 0.9 CATEGORY TOTAL 1,301.1 4.0 100.0 UNIT SALES CHANGE VS. AVG. PRICE TOP BRANDS (MILLIONS) YEAR AGO PER UNIT Quaker 190.5 12.8% \$3.09 Private label 148.2 -3.9 2.09 Cream of Wheat 18.7 -1.9 3.66 Quaker Real Medleys 27.0 0.3 1.63 Quaker Lower Sugar 14.2 0.2 2.92 Bob's Red Mill 6.4 11.8 4.54 Quaker High Fiber 8.3 -9.8 2.82 Quaker Weight Control 7.6 -7.8 2.85 Kellogg's Special K Nourish 6.6 53.9 2.75 Better Oats Oat Revolution 4.7 -27.4 2.57 CATEGORY TOTAL 479.2 3.2 2.71 TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25. Source: IRI REFRIGERATED SKIM/LOWFAT MILK Unit sales were down 5.5%, dipping under 3 billion. Dollars sales were flat, up, 0.8%, due to an 11 -cent increase in average price. The top national brand was Hood, accounting for 3.4% of dollar sales, up 7.0% from last year. Horizon was the No. 2 national brand (3.4%), up 2.1%. Private label had a market share of 64.5%. \$ SALES CHANGE VS. TOP VENDORS (MILLIONS) YEAR AGO SHARE Private label \$6,208.3 1.9% 64.5% HP Hood 423.2 5.3 4.4 Dean Foods 344.4 -5.6 3.6 Whitewave Foods Co. 331.7 1.7 3.4 Prairie Farms Dairy 175.7 5.5 1.8 UNIT SALES CHANGE VS. AVG. PRICE TOP VENDORS (MILLIONS) YEAR AGO PER UNIT Private label 1,992.7 -4.9% \$3.12 HP Hood 104.0 2.0 4.07 Dean Foods 110.6 -11.5 3.11 Whitewave Foods Co. 69.6 -3.0 4.77 Prairie Farms Dairy 56.0 -3.0 3.14 \$ SALES CHANGE VS. TOP BRANDS (MILLIONS) YEAR AGO SHARE Private label \$6,208.3 1.9% 64.5% Hood Lactaid 342.5 7.0 3.6 Horizon Organic 330.9 2.1 3.4 Prairie Farms 167.9 6.9 1.7 Hiland 153.8 13.4 1.6 Deans 134.5 -5.3 1.4 Deans Land O Lakes 110.5 -12.5 1.1 Organic Valley 97.9 4.8 1.0 Hood 62.7 1.8 0.7 Alta Dena 62.5 -3.0 0.6 CATEGORY TOTAL 9,625.5 0.8 100.0 UNIT SALES CHANGE VS. AVG. PRICE TOP BRANDS (MILLIONS) YEAR AGO PER UNIT Private label 1,992.7 -4.9% \$3.12 Hood Lactaid 77.9 4.1 4.39 Horizon Organic 69.4 -2.5 4.77 Prairie Farms 53.6 -1.4 3.13 Hiland 46.7 6.1 3.29 Deans 43.7 -11.9 3.07 Deans Land O Lakes 34.1 -18.9 3.24 Organic Valley 21.4 -0.2 4.57 Hood 20.8 -1.7 3.01 Alta Dena 18.9 -4.6 3.31 CATEGORY TOTAL 2,989.5 -5.5 3.22 TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25. Source: IRI NATURAL CHEESE SLICES Sales were strong, up 12.6% in dollars, totaling just below \$1.9 billion. Units were also up a solid 5.9%. Store brands led the way with 40.5% of dollars, followed by Sargento at 23.5%. Kraft brands had a good year as the vendor was up 12.5% for the year. \$ SALES CHANGE VS. TOP VENDORS (MILLIONS) YEAR AGO SHARE Private label \$768.3 14.2% 40.5% Sargento Food Co. 502.7 8.5 26.5 Kraft Foods Group 192.3 12.5 10.1 Tillamook County Creamery 68.9 9.2 3.6 Crystal Farms 51.1 22.4 2.7 UNIT SALES CHANGE VS. AVG. PRICE TOP VENDORS (MILLIONS) YEAR AGO PER UNIT Private label 245.5 6.3% \$3.13 Sargento Food Co. 156.1 0.8 3.22 Kraft Foods Group 64.4 8.9 2.98 Tillamook County Creamery 13.9 8.2 4.97 Crystal Farms 14.3 22.2 3.57 \$ SALES CHANGE VS. TOP BRANDS (MILLIONS) YEAR AGO SHARE Private label \$768.3 14.2% 40.5% Sargento 445.5 5.3 23.5 Kraft 70.6 16.0 3.7 Kraft Big Slice 69.7 16.2 3.7 Tillamook 67.9 9.1 3.6 BelGioioso 47.1 11.3 2.5 Crystal Farms 36.8 32.0 1.9 Kraft Cracker Barrel 35.8 70.8 1.9 Boar's Head 25.6 34.6 1.3 Sargento Natural Blends 24.6 -7.6 1.3 CATEGORY TOTAL 1,898.5 12.6 100.0 UNIT SALES CHANGE VS. AVG. PRICE TOP BRANDS (MILLIONS) YEAR AGO PER UNIT Private label 245.5 6.3% \$3.13 Sargento 137.8 -2.1 3.23 Kraft 23.7 12.5 2.98 Kraft Big Slice 25.2 12.5 2.76 Tillamook 13.6 8.2 4.99 BelGioioso 7.3 4.9 6.46 Crystal Farms 11.7 29.5 3.15 Kraft Cracker Barrel 11.0 67.9 3.25 Boar's Head 4.1 26.2 6.31 Sargento Natural Blends 8.1 -14.4 3.04 CATEGORY TOTAL 560.3 5.9 3.39 TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25. Source: IRI NATURAL SHREDDED CHEESE A 20-cent average price increase led to a 9% gain in dollars, despite flat unit sales. The top national vendor was Kraft with 21.7% of dollars, up 8.3%. However, private label was the clear leader with 57.7% of dollars, up 8.6% Category sales pushed past \$4.6 billion, units were just below 1.4 billion. \$ SALES CHANGE VS. TOP VENDORS (MILLIONS) YEAR AGO SHARE Private label \$2,690.2 8.6% 57.7% Kraft Foods Group 1,009.6 8.3 21.7 Sargento Food Co. 396.0 1.6 8.5 Crystal Farms 137.3 6.8 2.9 Dairy Farmers of America 97.8 11.9 2.1 UNIT SALES CHANGE VS. AVG. PRICE TOP VENDORS (MILLIONS) YEAR AGO PER UNIT Private label 783.5 -1.6% \$3.43 Kraft Foods Group 320.7 1.2 3.15 Sargento Food Co. 121.2 -6.9 3.27 Crystal Farms 46.7 -4.8 2.94 Dairy Farmers of America 37.3 1.5 2.62 \$ SALES CHANGE VS. TOP BRANDS (MILLIONS) YEAR AGO SHARE Private label \$2,690.2 8.6% 57.7% Kraft 869.3 8.9 18.6 Sargento 354.9 0.9 7.6 Crystal Farms 129.3 6.7 2.8 Kraft Philadelphia 108.6 7.2 2.3 Borden 86.5 11.2 1.9 American Heritage 44.8 452.9 1.0 Sargento Artisan Blends 30.1 -13.1 0.6 BelGioioso 27.6 15.4 0.6 Tillamook 26.3 6.9 0.6

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CATEGORY TOTAL 4,663.0 9.0 100.0 UNIT SALES CHANGE VS. AVG. PRICE TOP BRANDS (MILLIONS) YEAR AGO PER UNIT Private label 783.5 -1.6% \$3.43 Kraft 276.8 1.3 3.14 Sargento 107.7 -7.9 3.30 Crystal Farms 44.2 -4.4 2.93 Kraft Philadelphia 37.0 1.1 2.93 Borden 34.6 1.6 2.50 American Heritage 15.8 504.0 2.84 Sargento Artisan Blends 9.7 -19.3 3.09 Belgioioso 6.7 13.6 4.15 Tillamook 6.5 0.7 4.05 CATEGORY TOTAL 1,399.7 0.0 3.33 TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25. Source: IRI FRESH EGGS Eggland's Best was the top national brand with 13.2% of dollar sales and 13.8% unit sales. Overall the category accounted for \$5.6 billion in sales, up 11.6%. Category unit sales topped 2 billion, up 1.2%. The average price per unit was \$2.65, 21 -cents higher than last year. \$ SALES CHANGE VS. TOP VENDORS (MILLIONS) YEAR AGO SHARE Private label \$2,984.8 10.9% 52.9% Eggland's Best 842.4 16.0 14.9 Country Creek Farms 541.5 27.8 9.6 Cal Maine Foods 158.3 9.3 2.8 Sunny Farms Corp. 98.8 -21.6 1.8 UNIT SALES CHANGE VS. AVG. PRICE TOP VENDORS (MILLIONS) YEAR AGO A. PER UNIT Private label 1,225.3 -0.8% \$2.44 Eggland's Best 255.8 13.2 3.29 Country Creek Farms 197.2 16.6 2.75 Cal Maine Foods 44.9 3.3 3.52 Sunny Farms Corp. 39.6 -25.8 2.50 \$ SALES CHANGE VS. TOP BRANDS (MILLIONS) YEAR AGO SHARE Private label \$2,984.8 10.9% 52.9% Eggland's Best 743.0 16.8 13.2 Great Day Farmers Market 401.7 22.4 7.1 Cal Maine Sunup 105.5 5.4 1.9 Sunny Farms 98.8 -21.6 1.8 Eggland's Best Land O' Lakes 86.0 14.3 1.5 Sauder's Eggs 63.1 6.0 1.1 Dutch Farms 57.9 -1.6 1.0 Hillendale Farms 50.8 3.9 0.9 Farmhouse 46.1 16.7 0.8 CATEGORY TOTAL 5,643.2 11.6 100.0 UNIT SALES CHANGE VS. AVG. PRICE TOP BRANDS (MILLIONS) YEAR AGO A. PER UNIT Private label 1,225.3 -0.8% \$2.44 Eggland's Best 226.2 13.8 3.28 Great Day Farmers Market 158.5 14.1 2.53 Cal Maine Sunup 30.7 0.0 3.44 Sunny Farms 39.6 -25.8 2.50 Eggland's Best Land O' Lakes 25.4 13.0 3.38 Sauder's Eggs 20.2 -2.7 3.12 Dutch Farms 29.6 -15.6 1.96 Hillendale Farms 23.3 -5.5 2.18 Farmhouse 12.9 10.4 3.59 CATEGORY TOTAL 2,132.50 1.2 2.65 TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25. Source: IRI FROZEN HANDHELD ENTREES (NON-BREAKFAST) White Castle branded products enjoyed the most growth, up almost 25%. Nestle USA's Hot Pockets was the best-selling brand with 25.8% of dollars. Ruiz Food's El Monterey brand was second, up 6.1% in dollars for 12.8% market share. Overall category sales approached \$2.5 billion. \$ SALES CHANGE VS. TOP VENDORS (MILLIONS) YEAR AGO SHARE Nestle USA \$838.8 -10.7% 34.5% Ruiz Food Products 321.2 6.7 13.2 Hillshire Brands Co. 174.8 6.6 7.2 The J.M. Smucker Co. 147.0 10.8 6.0 White Castle Foods Products 144.6 24.8 5.9 UNIT SALES CHANGE VS. AVG. PRICE TOP VENDORS (MILLIONS) YEAR AGO PER UNIT Nestle USA 260.1 -14.4% \$3.22 Ruiz Food Products 104.2 3.0 3.08 Hillshire Brands Co. 31.1 15.1 5.62 The J.M. Smucker Co. 30.3 8.6 4.85 White Castle Foods Products 25.4 21.3 5.69 \$ SALES CHANGE VS. TOP BRANDS (MILLIONS) YEAR AGO SHARE Hot Pockets \$628.3 -5.3% 25.8% El Monterey 312.6 6.1 12.8 State Fair 153.0 -3.1 6.3 Smucker's Uncrustables 147.0 10.8 6.0 White Castle 144.6 24.8 5.9 Lean Pockets 138.0 -18.3 5.7 Foster Farms 105.2 0.4 4.3 Private label 101.0 3.3 4.1 Jose Ole 60.8 1.7 2.5 Amy's 60.6 11.3 2.5 CATEGORY TOTAL 2,433.3 -0.1 100.0 UNIT SALES CHANGE VS. AVG. PRICE TOP BRANDS (MILLIONS) YEAR AGO PER UNIT Hot Pockets 172.3 -8.9% \$3.65 El Monterey 99.5 2.9 3.14 State Fair 26.2 3.0 5.83 Smucker's Uncrustables 30.3 8.6 4.85 White Castle 25.4 21.3 5.69 Lean Pockets 59.5 -17.9 2.32 Foster Farms 17.4 1.1 6.05 Private label 44.8 -6.3 2.26 Jose Ole 45.9 10.3 1.32 Amy's 23.3 12.4 2.60 CATEGORY TOTAL 742.9 -4.5 3.28 TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25. Source: IRI SINGLE-SERVE FROZEN DINNERS/ENTREES Despite a marginal price per unit increase (4-cents), dollars and units were off, 3.9% and 5.6% respectively. ConAgra Foods has closed the gap on Nestle USA for top vendor spot just .6% shy (29.4% to 28.6%). Both companies had sales greater than \$1.2 billion. Overall category sales were \$4.2 billion. \$ SALES CHANGE VS. TOP VENDORS (MILLIONS) YEAR AGO SHARE Nestle USA \$1,251.9 -10.4% 29.4% ConAgra Foods 1,225.6 -4.0 28.8 Heinz North America 410.3 -14.2 9.6 Bellisio Foods 373.4 2.5 8.8 Amy's Kitchen 213.1 21.3 5.0 UNIT SALES CHANGE VS. AVG. PRICE TOP VENDORS (MILLIONS) YEAR AGO PER UNIT Nestle USA 484.9 -12.5% \$2.58 ConAgra Foods 683.5 -4.3 1.79 Heinz North America 184.1 -15.2 2.23 Bellisio Foods 298.0 -1.6 1.25 Amy's Kitchen 55.1 24.5 3.87 \$ SALES CHANGE VS. TOP BRANDS (MILLIONS) YEAR AGO SHARE Stouffer's \$539.1 -3.2% 12.7% Marie Callender's 392.1 20.9 9.2 Weight Watchers Smart Ones 336.3 -12.3 7.9 Banquet 314.9 -6.5 7.4 Lean Cuisine Culnry Cllction 237.1 -6.8 5.6 Lean Cuisine Simple Favorites 225.6 -6.0 5.3 Healthy Choice Cafe Steamers 140.0 24.8 3.3 Hungry-Man 137.6 1.7 3.2 Healthy Chce Tp Chf Cfe Stmers

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111.2 -3.7 2.6 Healthy Choice 106.9 -38.4 2.5 CATEGORY TOTAL 4,257.6 -3.9 100.0 UNIT SALES CHANGE VS. AVG. PRICE TOP BRANDS (MILLIONS) YEAR AGO PER UNIT Stouffer's 197.7 -5.9% \$2.73 Marie Callender's 160.9 28.8 2.44 Weight Watchers Smart Ones 156.7 -13.5 2.15 Banquet 309.8 -7.1 1.02 Lean Cuisine Culnry Cllction 90.0 -7.6 2.63 Lean Cuisine Simple Favorites 103.4 -11.4 2.18 Healthy Choice Cafe Steamers 56.6 27.2 2.47 Hungry-Man 51.4 1.0 2.68 Healthy Chce Tp Chf Cfe Stmers 45.6 -1.7 2.44 Healthy Choice 44.1 -40.9 2.42 CATEGORY TOTAL 1,988.6 -5.6 2.14 TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25. Source: IRI MULTI-SERVE FROZEN DINNERS/ENTREES The category struggled last year as dollars were down 1.5% while units were down 4.5%. Overall sales topped \$2 billion, led by Stouffer's and its 37.6% market share. On the vendor side, third best Birds Eye Foods was up 9.6% in dollars, while the top two, Nestle USA (-2.6%) and ConAgra (-3.4%) were down. \$ SALES CHANGE VS. TOP VENDORS (MILLIONS) YEAR AGO SHARE Nestle USA \$797.0 -2.6% 39.8% ConAgra Foods 440.2 -3.4 22.0 Birds Eye Foods 259.3 9.6 13.0 Private label 104.3 -6.8 5.2 Michael Angelo's Grmet Food. 69.3 10.8 3.5 UNIT SALES CHANGE VS. AVG. PRICE TOP VENDORS (MILLIONS) YEAR AGO PER UNIT Nestle USA 104.7 -9.1% \$7.61 ConAgra Foods 78.1 -0.8 5.64 Birds Eye Foods 56.2 6.4 4.61 Private label 14.1 -12.0 7.38 Michael Angelo's Grmet Food. 7.2 5.8 9.57 \$ SALES CHANGE VS. TOP BRANDS (MILLIONS) YEAR AGO SHARE Stouffer's \$753.6 0.9% 37.6% Birds Eye Voila 256.4 9.8 12.8 Bertolli 164.1 -5.7 8.2 ConAgra P F Chang's Hme Mnu 109.2 -5.1 5.5 Private label 104.3 -6.8 5.2 Michael Angelo's 69.3 10.8 3.5 Marie Callender's 65.0 -22.8 3.2 Banquet 60.9 10.1 3.0 Gourmet Dining 44.6 -14.6 2.2 On-Cor 33.5 8.7 1.7 CATEGORY TOTAL 2,001.7 -1.5 100.0 UNIT SALES CHANGE VS. AVG. PRICE TOP BRANDS (MILLIONS) YEAR AGO PER UNIT Stouffer's 96.5 -4.8% \$7.81 Birds Eye Voila 55.9 6.5 4.58 Bertolli 24.9 -5.8 6.60 ConAgra P F Chang's Hme Mnu 15.4 2.7 7.08 Private label 14.1 -12.0 7.38 Michael Angelo's 7.2 5.8 9.57 Marie Callender's 11.3 -20.8 5.73 Banquet 20.3 6.5 3.01 Gourmet Dining 8.8 -21.5 5.09 On-Cor 10.7 6.5 3.12 CATEGORY TOTAL 322.8 -4.5 6.20 TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25. Source: IRI REFRIGERATED FRUIT DRINK SunnyD is still shining, though not as brightly. The top brand was down 7.6% in dollars, 2.4% in units. Coca-Cola, with its Minute Maid brand, was the top vendor, edging out Sunny Delight 28.8% to 28.1%. Tropicana Dole Beverages was third coming in at 21.7%. Overall category dollars were down 6.3%. \$ SALES CHANGE VS. TOP VENDORS (MILLIONS) YEAR AGO SHARE Coca-Cola Co. \$282.7 -14.2% 28.8% Sunny Delight Beverages Co. 276.3 -5.7 28.1 Tropicana Dole Beverages 213.5 -2.1 21.7 Welch Foods 90.7 3.9 9.2 Millennium Products 32.9 60.3 3.3 UNIT SALES CHANGE VS. AVG. PRICE TOP VENDORS (MILLIONS) YEAR AGO PER UNIT Coca-Cola Co. 165.7 -27.0% \$1.71 Sunny Delight Beverages Co. 134.3 1.4 2.06 Tropicana Dole Beverages 88.3 -2.8 2.42 Welch Foods 40.3 6.5 2.25 Millennium Products 10.2 59.2 3.22 \$ SALES CHANGE VS. TOP BRANDS (MILLIONS) YEAR AGO SHARE SunnyD \$270.0 -7.6% 27.5% Minute Maid Premium 215.3 -16.4 21.9 Tropicana Trop50 150.3 0.8 15.3 Welch's 90.7 4.7 9.2 Tropicana 62.3 -5.9 6.3 Bright & Early 37.7 1.3 3.8 GTS Kombucha Synergy 30.1 60.6 3.1 Minute Maid 17.6 3.2 1.8 Private label 10.8 -25.4 1.1 Kevita 9.9 81.0 1.0 CATEGORY TOTAL 983.1 -6.3 100.0 UNIT SALES CHANGE VS. AVG. PRICE TOP BRANDS (MILLIONS) YEAR AGO PER UNIT SunnyD 127.7 -2.4% \$2.11 Minute Maid Premium 117.7 -32.2 1.83 Tropicana Trop50 44.1 -1.2 3.41 Welch's 40.3 7.5 2.25 Tropicana 43.6 -2.5 1.43 Bright & Early 36.0 -0.3 1.05 GTS Kombucha Synergy 9.3 59.7 3.22 Minute Maid 5.8 2.8 3.01 Private label 6.5 -32.8 1.68 Kevita 3.4 81.0 2.94 CATEGORY TOTAL 478.4 -12.1 2.05 TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25. Source: IRI BOTTLED FRUIT DRINKS-SHELF STABLE Despite a drop of nearly 12% in dollars sales, Hawaiian Punch held onto the No. 1 brand spot with a 14.6% market share. V8 Splash was second at 11.7%. Snapple was the biggest brand gainer, up 18.1%. Overall category sales were just below \$1.5 billion. \$ SALES CHANGE VS. TOP VENDORS (MILLIONS) YEAR AGO SHARE Dr Pepper/Snapple Group \$320.3 -5.7% 21.4% Campbell Soup Co. 235.8 -0.3 15.7 Tampico Beverages 122.9 1.6 8.2 Welch Foods 103.9 -11.1 6.9 Kraft Foods Group 88.2 29.1 5.9 UNIT SALES CHANGE VS. AVG. PRICE TOP VENDORS (MILLIONS) YEAR AGO PER UNIT Dr Pepper/Snapple Group 170.4 -2.7% \$1.88 Campbell Soup Co. 101.2 -1.2 2.33 Tampico Beverages 84.4 1.9 1.46 Welch Foods 37.6 -10.1 2.76 Kraft Foods Group 76.4 16.7 1.15 \$ SALES CHANGE VS. TOP BRANDS (MILLIONS) YEAR AGO SHARE Hawaiian Punch \$219.2 -11.7% 14.6% V8 Splash 175.2 0.6 11.7 Tampico 122.9 1.6 8.2 Snapple 78.0 18.1 5.2 Little Hug Fruit Barrels 75.6 4.0 5.0 Private label 71.2 -16.6 4.8 Kool Aid Bursts 66.7 -0.6 4.4 Welch's 60.4 0.5 4.0 Motts for Tots

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40.0 16.8 2.7 V8 V Fusion Light 27.7 -24.5 1.9 CATEGORY TOTAL 1,497.9 -1.0 100.0 UNIT SALES CHANGE VS. AVG. PRICE TOP BRANDS (MILLIONS) YEAR AGO PER UNIT Hawaiian Punch 109.3 -9.5% \$2.00 V8 Splash 78.3 0.0 2.24 Tampico 84.4 1.9 1.46 Snapple 48.3 19.1 1.62 Little Hug Fruit Barrels 23.4 -3.1 3.22 Private label 42.5 -15.9 1.68 Kool Aid Bursts 64.7 -0.2 1.03 Welch's 19.1 5.2 3.16 Motts for Tots 15.7 -17.3 2.56 V8 V Fusion Light 9.0 -25.5 3.09 CATEGORY TOTAL 855.0 -1.9 1.75 TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25. Source: IRI REFRIGERATED ORANGE JUICE Simply Orange was the only brand in the top 5 that showed growth, up 1.4% in dollars, though down 1.4% in units due to a 10-cent price increase. Sixth best brand, Minute Maid was also up, 5.9% in dollars and 8.0% in units. Overall the category was down almost 4% in dollars and more than 6% in units. \$ SALES CHANGE VS. TOP VENDORS (MILLIONS) YEAR AGO SHARE Tropicana Dole Beverages \$907.3 -5.4% 29.5% Simply Orange Juice Co. 673.8 1.4 21.9 Private label 526.5 -4.5 17.1 Citrus World 396.5 -4.6 12.9 Coca-Cola Co. 369.2 -6.1 12.0 UNIT SALES CHANGE VS. AVG. PRICE TOP VENDORS (MILLIONS) YEAR AGO PER UNIT Tropicana Dole Beverages 239.8 -5.9% \$3.78 Simply Orange Juice Co. 182.3 -1.4 3.70 Private label 184.4 -8.1 2.86 Citrus World 115.2 -8.5 3.44 Coca-Cola Co. 113.5 -6.6 3.25 \$ SALES CHANGE VS. TOP BRANDS (MILLIONS) YEAR AGO SHARE Tropicana Pure Premium \$873.8 -4.6% 28.4% Simply Orange 673.8 1.4 21.9 Private label 526.5 -4.5 17.1 Florida's Natural 371.6 -4.9 12.1 Minute Maid Premium 233.7 -11.0 7.6 Minute Maid 98.9 5.9 3.2 Homemaker Premium 35.6 -11.7 1.2 Minute Maid Premium Kids Plus 32.5 0.1 1.1 Citrus World Donald Duck 20.5 9.8 0.7 Tree Ripe 19.0 10.1 0.6 CATEGORY TOTAL 3,076.6 -3.9 100.0 UNIT SALES CHANGE VS. AVG. PRICE TOP BRANDS (MILLIONS) YEAR AGO PER UNIT Tropicana Pure Premium 229.0 -4.7% \$3.82 Simply Orange 182.3 -1.4 3.70 Private label 184.4 -8.1 2.86 Florida's Natural 104.3 -9.2 3.56 Minute Maid Premium 68.0 -12.6 3.43 Minute Maid 34.0 8.0 \$2.91 Homemaker Premium 14.3 -19.8 2.49 Minute Maid Premium Kids Plus 9.9 -4.3 3.27 Citrus World Donald Duck 9.00 8.4 2.27 Tree Ripe 8.8 9.5 2.16 CATEGORY TOTAL 903.5 -6.2 3.40 TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25. Source: IRI CHOCOLATE CANDY SNACK SIZE Snacking is down ... at least when it comes to candy. Dollars were off by 3.6% and units by 5%. Reeses, Snickers and Kit Kat were the top three brands and the only ones with double- digit market share (14.5%, 13.8% and 11.7% respectively). Hershey was the top vendor with 53.9% dollar share. \$ SALES CHANGE VS. TOP VENDORS (MILLIONS) YEAR AGO SHARE The Hershey Co. \$644.6 -1.0% 53.9% Mars 450.5 -6.5 37.7 Nestle USA 97.1 -6.9 8.1 Tootsie Roll Industries 1.8 0.9 0.2 Just Born 1.0 -35.9 0.1 UNIT SALES CHANGE VS. AVG. PRICE TOP VENDORS (MILLIONS) YEAR AGO PER UNIT The Hershey Co. 300.9 -2.8% \$2.14 Mars 210.9 -7.6 2.14 Nestle USA 32.4 -7.1 2.99 Tootsie Roll Industries 0.7 3.3 2.51 Just Born 0.3 -33.8 2.95 \$ SALES CHANGE VS. TOP BRANDS (MILLIONS) YEAR AGO SHARE Reeses \$174.0 -2.5% 14.5% Snickers 164.7 -6.4 13.8 Kit Kat 140.4 -1.8 11.7 All Hershey's products 115.2 6.3 9.6 Hershey's 94.3 4.1 7.9 Milky Way 71.4 -10.8 6.0 M & M'S 68.8 -7.3 5.8 Twix 60.2 -2.3 5.0 Peter Paul Almond Joy 50.9 -7.7 4.3 Three Musketeers 47.2 -5.2 3.9 CATEGORY TOTAL 1,196.3 -3.6 100.0 UNIT SALES CHANGE VS. AVG. PRICE TOP BRANDS (MILLIONS) YEAR AGO PER UNIT Reeses 94.2 -3.9% \$1.85 Snickers 76.6 -6.6 2.15 Kit Kat 70.1 -3.4 2.00 All Hershey's products 13.5 5.3 8.52 Hershey's 55.5 6.1 1.70 Milky Way 38.0 -14.4 1.88 M & M'S 34.6 -7.5 1.99 Twix 33.3 -3.2 1.81 Peter Paul Almond Joy 28.1 -8.1 1.81 Three Musketeers 23.3 -6.3 2.02 CATEGORY TOTAL 545.8 -5.0 2.19 TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25. Source: IRI CHOCOLATE CANDY BOX/BAG/BAR < 3.5 OUNCES Mars edged out Hershey for most brands in the top 10, S to 4. However, Hershey products outsold Mars', capturing 43.8% of dollars versus 34.7%. Nestle Butterfinger was the only non Hershey or Mars brand in the top 10, placing 8th, up almost 40%. \$ SALES CHANGE VS. TOP VENDORS (MILLIONS) YEAR AGO SHARE The Hershey Co. \$796.5 -0.7% 43.8% Mars 631.3 -1.7 34.7 Nestle USA 108.4 -2.5 6.0 Lindt & Sprungli A.G. 31.1 73.0 1.7 Russell Stover Candies 26.7 -9.9 1.5 UNIT SALES CHANGE VS. AVG. PRICE TOP VENDORS (MILLIONS) YEAR AGO PER UNIT The Hershey Co. 860.7 -3.9% \$0.93 Mars 680.8 -4.3 0.93 Nestle USA 131.7 -12.9 0.82 Lindt & Sprungli A.G. 39.5 54.2 0.79 Russell Stover Candies 28.6 -2.0 0.93 \$ SALES CHANGE VS. TOP BRANDS (MILLIONS) YEAR AGO SHARE M & M'S \$234.4 0.3% 12.9% Reeses 192.5 -0.7 10.6 Snickers 182.7 -4.8 10.0 Hershey's 157.0 -0.1 8.6 Kit Kat 145.6 -1.3 8.0 Hershey's Cookies 'n' Creme 50.9 4.4 2.8 Twix 46.6 14.6 2.6 Nestle Butterfinger 46.1 39.9 2.5 Three Musketeers 42.1 -1.5 2.3 Milky Way 39.0 -8.9 2.1 CATEGORY TOTAL 1,818.7 0.8 100.0 UNIT SALES CHANGE VS. AVG. PRICE TOP BRANDS (MILLIONS) YEAR

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AGO PER UNIT M & M'S 248.2 -1.4% \$0.94 Reeses 187.6 -3.2 1.03 Snickers 205.0 -6.7 0.89 Hershey's 178.8 -3.0 0.88 Kit Kat 152.5 -5.4 0.95 Hershey's Cookies 'n' Creme 63.5 1.9 0.80 Twix 54.5 2.1 0.85 Nestle Butterfinger 54.7 17.7 0.84 Three Musketeers 45.6 -6.8 0.92 Milky Way 44.7 -10.4 0.87 CATEGORY TOTAL 1,902.7 -3.2 0.96 TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25. Source: IRI CHOCOLATE CANDY BOX/BAG/BAR > 3.5 OUNCES With sales of more than \$4.6 billion, up 3.4%, the category shows no signs of slowing. M & M'S are still clearly the top brand at 12.5% dollar share. However, brands two through 10 are separated by less than 4%. Hershey held onto the top vendor spot with 38.6% of dollars, followed by Mars at 27.5%. \$ SALES CHANGE VS. TOP VENDORS (MILLIONS) YEAR AGO SHARE The Hershey Co. \$1,791.6 0.2% 38.6% Mars 1,274.5 2.5 27.5 Nestle USA 293.5 -7.5 6.3 Lindt & Sprungli A.G. 265.5 10.0 5.7 Ghirardelli Chocolate Co. 190.0 14.7 4.1 UNIT SALES CHANGE VS. AVG. PRICE TOP VENDORS (MILLIONS) YEAR AGO PER UNIT The Hershey Co. 577.0 -2.4% \$3.10 Mars 297.1 6.0 4.29 Nestle USA 133.9 -10.2 2.19 Lindt & Sprungli A.G. 83.0 8.4 3.20 Ghirardelli Chocolate Co. 58.9 14.2 3.23 \$ SALES CHANGE VS. TOP BRANDS (MILLIONS) YEAR AGO SHARE M & M'S \$580.7 -4.5% 12.5% Hershey's 322.3 2.0 6.9 Reeses 240.3 -2.7 5.2 All Hershey's products 202.9 8.2 4.4 Hershey's Kisses 184.7 1.3 4.0 All Mars Products 158.1 4.6 3.4 Lindt Lindor 147.5 11.1 3.2 Brookside 144.0 28.9 3.1 Snickers 139.8 -6.3 3.0 Private label 139.6 8.7 3.0 CATEGORY TOTAL 4,643.0 3.4 100.0 UNIT SALES CHANGE VS. AVG. PRICE TOP BRANDS (MILLIONS) YEAR AGO PER UNIT M & M'S 130.9 -3.9% \$4.44 Hershey's 114.7 -1.2 2.81 Reeses 56.4 -4.2 4.26 All Hershey's products 29.2 5.9 6.95 Hershey's Kisses 43.7 -2.5 4.22 All Mars Products 21.6 7.5 7.31 Lindt Lindor 38.6 10.7 3.82 Brookside 31.0 29.6 4.64 Snickers 25.6 -6.3 5.46 Private label 52.7 0.4 2.65 CATEGORY TOTAL 1,443.3 1.1 3.22 TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25. Source: IRI SUGAR-FREE CHOCOLATE CANDY Consumers may be looking to eat healthy, but not when it comes to candy. Sugar-free candy sales were down 6% in both dollars and units. Atkins Nutritionals made its entry with its higher priced Endulge brand. With an average price of \$ 10.24 Endulge was the 7th best selling brand with \$1.1 million in sales. \$ SALES CHANGE VS. TOP VENDORS (MILLIONS) YEAR AGO SHARE Russell Stover Candies \$86.3 -6.1% 71.3% The Hershey Co. 21.0 -7.7 17.3 Whitman's Chocolates 6.7 -11.8 5.5 Atkins Nutritionals 1.1 NA 0.9 DeMet's Candy Co. 0.9 -54.7 0.7 UNIT SALES CHANGE VS. AVG. PRICE TOP VENDORS (MILLIONS) YEAR AGO PER UNIT Russell Stover Candies 45.8 -5.8% \$1.88 The Hershey Co. 8.5 -8.5 2.46 Whitman's Chocolates 1.5 -16.6 4.56 Atkins Nutritionals 0.1 NA 10.24 DeMet's Candy Co. 0.4 -47.8 2.34 \$ SALES CHANGE VS. TOP BRANDS (MILLIONS) YEAR AGO SHARE Russell Stover \$86.3 -6.0% 71.2% Reeses 6.9 -10.9 5.7 Whitman's Sampler 5.8 -8.3 4.8 Hershey's 5.8 -13.0 4.8 Hershey's Special Dark 5.2 -6.5 4.3 York 3.1 12.0 2.5 Atkins Endulge 1.1 NA 0.9 DeMet's Turtles 0.9 -54.4 0.7 Whitman's 0.8 -30.0 0.7 Lily's 0.8 43.1 0.7 CATEGORY TOTAL 121.1 -6.0 100.0 UNIT SALES CHANGE VS. AVG. PRICE TOP BRANDS (MILLIONS) YEAR AGO PER UNIT Russell Stover 45.8 -5.7% \$1.88 Reeses 2.4 -11.8 2.85 Whitman's Sampler 1.0 -10.7 5.85 Hershey's 2.5 -9.6 2.34 Hershey's Special Dark 2.3 -10.6 2.27 York 1.3 5.6 2.31 Atkins Endulge 0.1 NA 10.24 DeMet's Turtles 0.4 -47.1 2.34 Whitman's 0.5 -26.8 1.80 Lily's 0.2 34.8 3.86 CATEGORY TOTAL 58.2 -6.0 2.08 TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25. Source: IRI HARD SUGAR CANDY/PKG & ROLL CANDY A good year from Jolly Rancher (up 7.3% in dollars) took the top spot from Werther's (down 2.5%). On the vendor side, sales were pretty well dispersed. Top Vendor Hershey's captured 19.9% of dollars, while No. 5, private label, was at a respectable 8.7%. \$ SALES CHANGE VS. TOP VENDORS (MILLIONS) YEAR AGO SHARE The Hershey Co. \$98.8 -3.0% 19.9% Storck USA 83.3 -2.5 16.8 Tootsie Roll Industries 58.5 0.0 11.8 Spangler Candy Co. 53.3 2.4 10.7 Private label 43.3 3.0 8.7 UNIT SALES CHANGE VS. AVG. PRICE TOP VENDORS (MILLIONS) YEAR AGO PER UNIT The Hershey Co. 43.0 -4.8% \$2.30 Storck USA 41.1 -3.1 2.02 Tootsie Roll Industries 25.9 0.2 2.26 Spangler Candy Co. 14.3 3.9 3.71 Private label 37.5 0.1 1.15 \$ SALES CHANGE VS. TOP BRANDS (MILLIONS) YEAR AGO SHARE Jolly Rancher \$86.4 7.3% 17.4% Werther's Original 83.3 -2.5 16.8 Private label 43.3 3.0 8.7 Spangler Dum Dum Pops 41.0 4.1 8.3 Charms Blow Pop 31.6 -8.3 6.4 Tootsie Roll Pops 28.4 -5.0 5.7 Lifesavers 28.4 0.9 5.7 Nips 19.3 -9.7 3.9 Original Gourmet 17.3 8.5 3.5 Tootsie Pops 13.3 -6.4 2.7 CATEGORY TOTAL 497.0 -2.2 100.0 UNIT SALES CHANGE VS. AVG. PRICE TOP BRANDS (MILLIONS) YEAR AGO PER UNIT Jolly Rancher 35.6 13.1% \$2.42 Werther's Original 41.1 -3.1 2.02 Private label 37.5 0.1 1.15 Spangler Dum Dum Pops 10.0 4.2 4.08 Charms Blow Pop 21.5 -8.2 1.47 Tootsie Roll Pops 12.5 -6.5

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2.26 Lifesavers 13.4 -1.4 2.11 Nips 17.3 -14.1 1.11 Original Gourmet 34.9 9.7 0.50 Tootsie Pops 2.6 -8.0 5.10 CATEGORY TOTAL 309.0 -2.5 1.61 TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25. Source: IRI NON CHOCOLATE CHEWY CANDY Candy sales are clearly more than just chocolate as this category was up a solid 6.3% in dollars, 4.5% in units. Skittles and Starburst were best-selling national brands with dollar shares of 9.1% and 8.2% respectively, trailing private label (10.7%). Wrigley was the top vendor with 26.3% of all dollars. \$ SALES CHANGE VS. TOP VENDORS (MILLIONS) YEAR AGO SHARE William Wrigley Jr. Co. \$498.2 5.1% 26.3% Mondelez International 215.9 13.4 11.4 Private label 202.6 -6.8 10.7 Ferrara Candy Co. 133.7 5.6 7.1 The Hershey Co. 133.7 20.8 7.1 UNIT SALES CHANGE VS. AVG. PRICE TOP VENDORS (MILLIONS) YEAR AGO PER UNIT William Wrigley Jr. Co. 249.7 3.0% \$2.00 Mondelez International 120.9 14.9 1.79 Private label 164.4 -7.7 1.23 Ferrara Candy Co. 84.1 3.1 1.59 The Hershey Co. 64.4 6.4 2.08 \$ SALES CHANGE VS. TOP BRANDS (MILLIONS) YEAR AGO SHARE Private label \$202.6 -6.8% 10.7% Skittles 172.1 13.0 9.1 Starburst 155.0 17.7 8.2 Sour Patch Kids 94.2 8.2 5.0 Swedish Fish 68.3 2.9 3.6 Haribo Gold Bears 61.2 9.3 3.2 Jolly Rancher 59.2 -10.9 3.1 Lifesavers Gummies 53.4 -3.5 2.8 Skittles & Starburst 48.7 -2.2 2.6 Air Heads 47.7 17.9 2.5 CATEGORY TOTAL 1,895.4 6.3 100.0 UNIT SALES CHANGE VS. AVG. PRICE TOP BRANDS (MILLIONS) YEAR AGO PER UNIT Private label 164.4 -7.7% \$1.23 Skittles 98.7 14.6 1.74 Starburst 79.9 13.6 1.94 Sour Patch Kids 53.4 5.5 1.76 Swedish Fish 33.5 1.6 2.04 Haribo Gold Bears 41.6 14.0 1.47 Jolly Rancher 34.6 -10.3 1.71 Lifesavers Gummies 29.9 -1.2 1.78 Skittles & Starburst 5.4 -14.6 8.87 Air Heads 38.9 18.7 1.23 CATEGORY TOTAL 1,182.0 4.5 1.60 TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25. Source: IRI GROUND COFFEE Top brand Folgers had almost double the dollar share of its closest competitor, Maxwell House (31% to 15.7%). Of the top 10 brands, only Peet's had any significant growth, up 4.9%. Overall, the category was down almost 3% in dollars and 3.5% in units. Sales approached \$4 billion. \$ SALES CHANGE VS. TOP VENDORS (MILLIONS) YEAR AGO SHARE The Folger Coffee Co. \$1,273.3 -5.5% 31.9% Kraft Foods Group 792.4 -3.2 19.9 Private label 372.8 -4.7 9.3 Starbucks Coffee Co. 346.1 0.3 8.7 The J. M. Smucker Co. 319.7 -1.1 8.0 UNIT SALES CHANGE VS. AVG. PRICE TOP VENDORS (MILLIONS) YEAR AGO PER UNIT The Folger Coffee Co. 180.1 -6.8% \$7.07 Kraft Foods Group 131.9 -4.5 6.01 Private label 70.9 -3.7 5.26 Starbucks Coffee Co. 41.6 0.8 8.31 The J. M. Smucker Co. 37.5 -2.0 8.54 \$ SALES CHANGE VS. TOP BRANDS (MILLIONS) YEAR AGO SHARE Folgers \$1,235.0 -5.3% 31.0% Maxwell House 625.9 -5.5 15.7 Private label 372.8 -4.7 9.3 Starbucks 334.0 0.6 8.4 Dunkin' Donuts 305.1 0.7 7.7 Gevalia 103.8 10.0 2.6 Peet's Coffee 91.3 4.9 2.3 Community 86.2 1.3 2.2 Eight O' Clock 80.6 -9.2 2.0 Chock full o' Nuts 71.3 -2.3 1.8 CATEGORY TOTAL 3,988.2 -2.9 100.0 UNIT SALES CHANGE VS. AVG. PRICE TOP BRANDS (MILLIONS) YEAR AGO PER UNIT Folgers 173.2 -6.7% \$7.13 Maxwell House 106.6 -7.0 5.87 Private label 70.9 -3.7 5.26 Starbucks 40.1 1.2 8.33 Dunkin' Donuts 35.5 3.3 8.60 Gevalia 16.2 11.8 6.42 Peet's Coffee 10.3 4.2 8.83 Community 12.2 -1.4 7.06 Eight O' Clock 14.7 -6.8 5.49 Chock full o' Nuts 15.4 -5.0 4.63 CATEGORY TOTAL 626.4 -3.5 6.37 TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25. Source: IRI GROUND DECAFFEINATED COFFEE There was little buzz surrounding decaffeinated coffee. Dollars dipped 6.7% while units were down 7%. Eight O' Clock entered the top 10 with an increase of 37.4% in dollars eclipsing the \$5 million mark. Gevalia was the only brand in the top 10 to improve dollar sales, up 9.7%. \$ SALES CHANGE VS. TOP VENDORS (MILLIONS) YEAR AGO SHARE The Folger Coffee Co. \$94.8 -8.4% 29.8% Private label 63.1 -8.6 19.8 Kraft Foods Group 35.7 -5.1 11.2 The J.M. Smucker Co. 30.5 -7.8 9.6 Starbucks Coffee Co. 26.2 -1.7 8.2 UNIT SALES CHANGE VS. AVG. PRICE TOP VENDORS (MILLIONS) YEAR AGO PER UNIT The Folger Coffee Co. 12.5 -10.3% \$7.61 Private label 11.6 -8.6 5.46 Kraft Foods Group 5.8 -4.1 6.19 The J.M. Smucker Co. 4.0 -11.0 7.60 Starbucks Coffee Co. 3.4 0.0 7.73 \$ SALES CHANGE VS. TOP BRANDS (MILLIONS) YEAR AGO SHARE Folgers \$87.4 -8.5% 27.4% Private label 63.1 -8.6 19.8 Dunkin' Donuts 27.2 -2.9 8.5 Starbucks 26.2 -1.7 8.2 Maxw'ell House 21.5 -11.9 6.7 Peet's Coffee 14.1 -1.5 4.4 Gevalia 12.5 9.7 3.9 New England 8.9 -5.8 2.8 Folgers Simply Smooth 6.9 -8.8 2.2 Eight O' Clock 5.1 37.4 1.6 CATEGORY TOTAL 318.5 -6.7 100.0 UNIT SALES CHANGE VS. AVG. PRICE TOP BRANDS (MILLIONS) YEAR AGO PER UNIT Folgers 11.1 -10.8% \$7.90 Private label 11.6 -8.6 5.46 Dunkin' Donuts 3.6 -0.8 7.58 Starbucks 3.4 0.0 7.73 Maxw'ell House 3.5 -10.7 6.14 Peet's Coffee 1.6 -1.2 8.78 Gevalia 1.9 12.4 6.48 New England 1.8 -0.9 5.07 Folgers Simply Smooth 1.3 -8.0 5.36 Eight O' Clock 0.9 42.9 5.85 CATEGORY TOTAL 48.5 -7.0 6.56 TOTAL U.S. SALES THROUGH

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SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25. Source: IRI SINGLE CUP COFFEE The single cup phenomenon is still percolating. Dollar and unit growth is still in the double-digits, 23% and 28.8% respectively, as sales have pushed past \$3 billion. The top vendor is Keurig Green Mountain (44%) but others enjoyed greater growth, including Starbucks (27.3%) and Kraft (51.7%). Private label was also up significantly, 74%. \$ SALES CHANGE VS. TOP VENDORS (MILLIONS) YEAR AGO SHARE Keurig Green Mountain \$1,391.7 10.8% 44.0% Starbucks Coffee Co. 450.5 27.6 14.2 The Folger Coffee Co. 357.4 3.2 11.3 Private label 339.2 74.0 10.7 Kraft Foods Group 277.5 51.7 8.8 UNIT SALES CHANGE VS. AVG. PRICE TOP VENDORS (MILLIONS) YEAR AGO PER UNIT Keurig Green Mountain 142.8 15.2% \$9.75 Starbucks Coffee Co. 45.6 34.7 9.87 The Folger Coffee Co. 40.1 8.4 8.91 Private label 43.3 66.8 7.84 Kraft Foods Group 34.6 50.0 8.02 \$ SALES CHANGE VS. TOP BRANDS (MILLIONS) YEAR AGO SHARE Keurig Green Mountain Coffee \$494.2 4.5% 15.6% Starbucks 448.7 27.3 14.2 Private label 339.2 74.0 10.7 Folgers Gourmet Selections 331.2 4.5 10.5 Keurig Eight O' Clock 167.8 40.5 5.3 Gevalia 131.9 64.5 4.2 Keurig Donut House Collection 129.9 -18.6 4.1 Keurig New man's Own Orgnics 104.5 -10.7 3.3 Maxwell House Cafe Collection 103.7 31.9 3.3 Keurig Donut shop coffee 90.2 17,319.3 0.8 CATEGORY TOTAL 3,164.8 23.0 100.0 UNIT SALES CHANGE VS. AVG. PRICE TOP BRANDS (MILLIONS) YEAR AGO PER UNIT Keurig Green Mountain Coffee 52.3 6.0% \$9.46 Starbucks 45.5 34.4 9.86 Private label 43.3 66.8 7.84 Folgers Gourmet Selections 35.4 11.9 9.35 Keurig Eight O' Clock 22.8 43.7 7.35 Gevalia 17.2 68.3 7.66 Keurig Donut House Collection 15.8 9.2 8.23 Keurig New man's Own Orgnics 7.0 -4.6 14.94 Maxwell House Cafe Collection 11.8 23.3 8.78 Keurig Donut shop coffee 5.6 24,029.0 16.19 CATEGORY TOTAL 348.0 28.8 9.09 TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25. Source: IRI DRY CAT FOOD With four of the top 10 brands, Nestle Purina captured more than 55% of dollars in the dry cat food category. There was no clear brand leader as the top three (Purina Kit & Kaboodle, private label and Meow Mix Original Choice) were separated by just 0.8%. Overall, the category accounted for more than \$2.3 billion, down 1.5%. \$ SALES CHANGE VS. TOP VENDORS (MILLIONS) YEAR AGO SHARE Nestle Purina PetCare Co. \$1,282.8 0.5% 55.3% Big Heart Pet Brands 559.7 0.4 24.1 Private label 197.4 -9.6 8.5 Procter & Gamble 185.2 -9.6 8.0 Mars 31.5 -27.1 1.4 UNIT SALES CHANGE VS. AVG. PRICE TOP VENDORS (MILLIONS) YEAR AGO PER UNIT Nestle Purina PetCare Co. 164.0 -2.4% \$7.82 Big Heart Pet Brands 77.0 0.3 7.27 Private label 35.6 -5.7 5.54 Procter & Gamble 19.4 -10.0 9.57 Mars 3.9 -42.7 8.09 \$ SALES CHANGE VS. TOP BRANDS (MILLIONS) YEAR AGO SHARE Purina Kit & Kaboodle \$209.9 2.8% 9.1% Private label 197.4 -9.6 8.5 Meow Mix Original Choice 192.6 29.0 8.3 Iams ProActive Health 137.7 -7.5 5.9 Purina Cat Chow Indoor 132.7 -8.7 5.7 Meow Mix 100.2 -33.8 4.3 Purina Cat Chow Complete 99.2 0.3 4.3 Meow Mix Tender Centers 85.8 19.2 3.7 Purina Cat Chow Naturals 85.1 27.7 3.7 9 Lives Daily Essentials 84.4 -4.0 3.6 CATEGORY TOTAL 2,318.4 -1.5 100.0 UNIT SALES CHANGE VS. AVG. PRICE TOP BRANDS (MILLIONS) YEAR AGO PER UNIT Purina Kit & Kaboodle 22.2 0.3% \$9.45 Private label 35.6 -5.7 5.54 Meow Mix Original Choice 21.1 10.1 9.15 Iams ProActive Health 14.1 -8.0 9.77 Purina Cat Chow Indoor 16.5 -8.4 8.05 Meow Mix 12.7 -21.9 7.89 Purina Cat Chow Complete 12.4 -4.1 7.99 Meow Mix Tender Centers 12.9 19.1 6.65 Purina Cat Chow Naturals 11.2 20.8 7.62 9 Lives Daily Essentials 10.7 -0.7 7.87 CATEGORY TOTAL 311.4 -3.3 7.45 TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25. Source: IRI WET CAT FOOD Nestle Purina is the cat's meow, with more than three quarters of category dollars, up 3.3%. All but two of the top 10 brands belong to the St. Louis-based vendor. Its fastest growing brand is Fancy Feast Gravy Lovers, up 33.4% in dollars. Overall category sales approached \$2 billion. \$ SALES CHANGE VS. TOP VENDORS (MILLIONS) YEAR AGO SHARE Nestle Purina PetCare Co. \$1,528.6 3.3% 76.8% Big Heart Pet Brands 215.5 -8.5 10.8 Private label 114.9 -6.3 5.8 Mars 91.1 -9.2 4.6 Procter & Gamble 25.4 92.9 1.3 UNIT SALES CHANGE VS. AVG. PRICE TOP VENDORS (MILLIONS) YEAR AGO PER UNIT Nestle Purina PetCare Co. 1,722.7 1.6% \$0.89 Big Heart Pet Brands 165.6 -11.1 1.30 Private label 141.5 -13.4 0.81 Mars 78.1 10.5 1.17 Procter & Gamble 22.0 101.3 1.15 \$ SALES CHANGE VS. TOP BRANDS (MILLIONS) YEAR AGO SHARE Fancy Feast \$284.0 0.1% 14.3% Purina Friskies 241.0 -1.9 12.1 Friskies 216.5 -0.5 10.9 Purina Fancy Feast 174.6 -2.4 8.8 Private label 114.9 -6.3 5.8 9 Lives 102.9 -6.9 5.2 Fancy Feast Elegant Medleys 92.1 -3.1 4.6 Fancy Feast Gravy Lovers 83.9 33.4 4.2 Friskies Tasty Treasures 73.0 -4.7 3.7 Friskies Prime Filets 55.0 -8.6 2.8 CATEGORY TOTAL 1,991.0 1.3 100.0 UNIT SALES CHANGE VS. AVG. PRICE TOP BRANDS (MILLIONS) YEAR AGO PER UNIT Fancy Feast 472.8 0.6% \$0.60 Purina Friskies 433.3 -1.9 0.56

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Friskies 84.4 -3.2 2.56 Purina Fancy Feast 51.1 -3.8 3.42 Private label 141.5 -13.4 0.81 9 Lives 89.9 -7.5 1.14 Fancy Feast Elegant Medleys 62.7 -8.2 1.47 Fancy Feast Gravy Lovers 98.2 37.4 0.85 Friskies Tasty Treasures 98.4 -13.7 0.74 Friskies Prime Filets 67.0 -2.6 0.82 CATEGORY TOTAL 2,148.5 -0.8 0.93 TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25. Source: IRI DRY DOG FOOD Category leader Nestle Purina had five of the top 10 brands and was the only vendor not to suffer a decrease in sales. The biggest brand gainer was Rachael Ray Nutrish, up 30.1%, good enough for 2.2% of category dollars. Overall, category dollars dipped below \$5.2 billion a 2.8% decrease. Units were down 3.4%. \$ SALES CHANGE VS. TOP VENDORS (MILLIONS) YEAR AGO SHARE Nestle Purina PetCare Co. \$2,401.3 0.2% 46.2% Private label 833.5 -9.6 16.0 Mars 658.4 -3.7 12.7 Procter & Gamble 531.2 -8.7 10.2 Big Heart Pet Brands 460.4 -4.5 8.9 UNIT SALES CHANGE VS. AVG. PRICE TOP VENDORS (MILLIONS) YEAR AGO PER UNIT Nestle Purina PetCare Co. 179.1 0.3% \$13.41 Private label 67.7 -12.6 12.31 Mars 50.5 -2.9 13.03 Procter & Gamble 31.1 -10.9 17.06 Big Heart Pet Brands 50.9 -1.1 9.04 \$ SALES CHANGE VS. TOP BRANDS (MILLIONS) YEAR AGO SHARE Private label \$833.5 -9.6% 16.0% Purina Dog Chow 536.5 3.3 10.3 Pedigree 459.4 -3.7 8.8 Purina One Smart Blend 314.4 2.1 6.0 Iams ProActive Health 276.9 -10.2 5.3 Purina Beneful 253.1 4.5 4.9 Kibbles 'n Bits 226.0 -11.7 4.3 Purina Beneful Healthy Weight 209.3 -4.3 4.0 Purina Alpo Prime Cuts 117.1 -0.1 2.3 Rachael Ray Nutrish 113.0 30.1 2.2 CATEGORY TOTAL 5,199.3 -2.8 100.0 UNIT SALES CHANGE VS. AVG. PRICE TOP BRANDS (MILLIONS) YEAR AGO PER UNIT Private label 67.7 -12.6% \$12.31 Purina Dog Chow 33.1 2.5 16.22 Pedigree 31.4 -2.9 14.61 Purina One Smart Blend 16.1 0.3 19.48 Iams ProActive Health 15.7 -8.2 17.63 Purina Beneful 19.2 4.9 13.20 Kibbles 'n Bits 25.0 -8.6 9.04 Purina Beneful Healthy Weight 16.2 4.6 12.93 Purina Alpo Prime Cuts 12.3 6.5 9.51 Rachael Ray Nutrish 7.8 23.8 14.49 CATEGORY TOTAL 406.2 -3.4 12.80 TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25. Source: IRI WET DOG FOOD The top two brands had strong years. Cesar Canine Cuisine was up 11.2% in dollars for a 14.6% market share and Pedigree Wet was up 8.9% for a 13.9% market share. The best growing were Purina Alpo Chop House (up 36.1%) and Purina Mighty Dog (up 34%). Category sales went past \$1.4 billion. \$ SALES CHANGE VS. TOP VENDORS (MILLIONS) YEAR AGO SHARE Mars \$668.1 3.8% 47.5% Nestle Purina PetCare Co. 479.3 1.9 34.1 Private label 132.5 -12.5 9.4 Big Heart Pet Brands 53.4 -3.2 3.8 Procter & Gamble 29.4 8.4 2.1 UNIT SALES CHANGE VS. AVG. PRICE TOP VENDORS (MILLIONS) YEAR AGO PER UNIT Mars 500.7 0.0% \$1.33 Nestle Purina PetCare Co. 348.6 0.2 1.37 Private label 114.6 -19.4 1.16 Big Heart Pet Brands 81.7 1.8 0.65 Procter & Gamble 15.5 5.6 1.90 \$ SALES CHANGE VS. TOP BRANDS (MILLIONS) YEAR AGO SHARE Cesar Canine Cuisine \$204.8 11.2% 14.6% Pedigree 195.3 8.9 13.9 Private label 132.5 -12.5 9.4 Pedigree Choice Cuts 97.4 -8.4 6.9 Purina Alpo Prime Cuts 92.2 -5.6 6.6 Purina Beneful Prepared Meals 80.5 -2.3 5.7 Purina Mighty Dog 67.4 34.0 4.8 Pedigree Little Champions 66.0 -9.5 4.7 Purina Alpo Chop House 50.2 36.1 3.6 Cesar Savory Delights 38.4 8.4 2.7 CATEGORY TOTAL 1,405.2 1.1 100.0 UNIT SALES CHANGE VS. AVG. PRICE TOP BRANDS (MILLIONS) YEAR AGO PER UNIT Cesar Canine Cuisine 159.2 -3.0% \$1.29 Pedigree 149.7 2.8 1.30 Private label 114.6 -19.4 1.16 Pedigree Choice Cuts 62.4 -1.4 1.56 Purina Alpo Prime Cuts 76.1 3.4 1.21 Purina Beneful Prepared Meals 40.7 -3.0 1.98 Purina Mighty Dog 46.9 -11.1 1.44 Pedigree Little Champions 20.6 -15.8 3.20 Purina Alpo Chop House 54.7 29.6 0.92 Cesar Savory Delights 40.9 5.2 0.94 CATEGORY TOTAL 1,083.7 -2.3 1.30 TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25. Source: IRI CAT SNACKS/BEVERAGES Mars increased its stronghold on the category, up 13.1% in dollars for a 61.4% market share. Mars'Whiskas Temptations was the top selling brand with a 40.6% dollar share. Overall, category dollars were up 7.4%, though down in units, 3.9%, due to an average price increase of 2 3-cents. \$ SALES CHANGE VS. TOP VENDORS (MILLIONS) YEAR AGO SHARE Mars \$274.1 13.1% 61.4% Nestle Purina PetCare Co. 143.5 -2.4 32.2 Big Heart Pet Brands 12.5 -17.0 2.8 Hartz Mountain Corp. 5.7 963.7 1.3 Worldwise 4.7 -5.6 1.0 UNIT SALES CHANGE VS. AVG. PRICE TOP VENDORS (MILLIONS) YEAR AGO PER UNIT Mars 118.2 0.1% \$2.32 Nestle Purina PetCare Co. 71.1 -13.1 2.02 Big Heart Pet Brands 10.1 -15.0 1.24 Hartz Mountain Corp. 4.3 2,031.4 1.32 Worldwise 1.3 -9.5 3.65 \$ SALES CHANGE VS. TOP BRANDS (MILLIONS) YEAR AGO SHARE Whiskas Temptations \$181.3 10.2% 40.6% Whiskas Temptations Mixlips 52.6 18.9 11.8 Friskies Party Mix 44.6 -21.9 10.0 Purina Whskr Lckn's Crnch Lvrs 14.6 -12.7 3.3 Friskies Party Mx Bchsd Crnch 13.9 2.5 3.1 Purina Whskr Lckn's Tndr Mmnts 11.9 -17.1 2.7 Friskies Party Mix Orgnl Crnch 11.8 0.2 2.6 Whiskas

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Temptations Tumblers 9.2 NA 2.1 Whiskas Temptations Chzy Mddls 8.7 44.1 2.0 Purina Whisker Lickin's 7.5 1.7 1.7 CATEGORY TOTAL 446.2 7.4 100.0 UNIT SALES CHANGE VS. AVG. PRICE TOP BRANDS (MILLIONS) YEAR AGO PER UNIT Whiskas Temptations 72.1 -3.9% \$2.52 Whiskas Temptations Mixllps 23.1 -1.7 2.27 Friskies Party Mix 22.5 -27.2 1.98 Purina Whskr Lckn's Crnch Lvrs 9.8 -11.7 1.49 Friskies Party Mx Bchsd Crnch 6.6 -10.1 2.10 Purina Whskr Lckn's Tndr Mmnts 10.0 -17.2 1.20 Friskies Party Mix Orgnl Crnch 3.2 -1.8 3.69 Whiskas Temptations Tumblers 4.4 NA 2.10 Whiskas Temptations Chzy Mddls 5.4 37.0 1.63 Purina Whisker Lickin's 2.5 -3.9 2.98 CATEGORY TOTAL 208.2 -3.9 2.14 TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25. Source: IRI DOG BISCUITS/TREATS/BEVERAGES The category was up in both dollars (6.5%) and units (1.6%). Milk-Bone was the top selling national brand with 10.3% of dollars, 2% more than No. 2 Purina Beggin' Strips. The biggest brand gainer was Milo's Kitchen (up 25.5%) from top vendor Big Heart Pet Brands. \$ SALES CHANGE VS. TOP VENDORS (MILLIONS) YEAR AGO SHARE Big Heart Pet Brands \$814.6 10.0% 37.7% Nestle Purina PetCare Co. 436.1 0.0 20.2 Mars 239.2 4.3 11.1 Private label 224.5 -4.3 10.4 Waggin Train 54.1 17,358.3 2.5 UNIT SALES CHANGE VS. AVG. PRICE TOP VENDORS (MILLIONS) YEAR AGO PER UNIT Big Heart Pet Brands 218.4 5.5% \$3.73 Nestle Purina PetCare Co. 98.9 2.7 4.41 Mars 44.9 -1.3 5.32 Private label 67.8 -10.7 3.31 Waggin Train 5.1 7,469.3 10.54 \$ SALES CHANGE VS. TOP BRANDS (MILLIONS) YEAR AGO SHARE Private label \$224.5 -4.3% 10.4% Milk-Bone 222.3 2.7 10.3 Purina Beggin' Strips 179.7 -7.9 8.3 Pup-Peroni 170.3 7.3 7.9 Pedigree Dentastix 146.0 9.5 6.8 Canine Carry Outs 117.5 8.2 5.4 Purina Busy Bone 71.0 1.7 3.3 Milos Kitchen 59.3 25.5 2.7 Milk-Bone Flavor Snacks 58.0 0.5 2.7 Purina Waggin Train 54.1 NA 2.5 CATEGORY TOTAL 2,160.3 6.5 100.0 UNIT SALES CHANGE VS. AVG. PRICE TOP BRANDS (MILLIONS) YEAR AGO PER UNIT Private label 67.8 -10.7% \$3.31 Milk-Bone 48.7 0.7 4.57 Purina Beggin' Strips 30.6 -11.7 5.88 Pup-Peroni 25.4 7.9 6.70 Pedigree Dentastix 24.2 5.7 6.03 Canine Carry Outs 74.0 7.6 1.59 Purina Busy Bone 16.7 1.8 4.25 Milos Kitchen 7.6 8.3 7.83 Milk-Bone Flavor Snacks 12.4 1.6 4.67 Purina Waggin Train 5.1 NA 10.54 CATEGORY TOTAL 511.1 1.6 4.23 TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25. Source: IRI BABY FORMULA--POWDER Mead Johnson overtook Abbot Nutrition as the top selling vendor off of its 13.6% dollar growth, compared to Abbot's 6.3% increase. However Abbot grabbed the top spot on the brand side with its Similac Advance product, beating out previous No. 1 Enfamil Premium, from Mead Johnson. \$ SALES CHANGE VS. TOP VENDORS (MILLIONS) YEAR AGO SHARE Mead Johnson Nutrition \$1,496.2 13.6% 39.2% Abbott Nutrition 1,404.7 6.3 36.8 Gerber Products Co. 630.6 -21.6 16.5 Private label 228.5 3.4 6.0 Nestle USA 32.4 15.7 0.8 UNIT SALES CHANGE VS. AVG. PRICE TOP VENDORS (MILLIONS) YEAR AGO PER UNIT Mead Johnson Nutrition 73.8 14.0% \$20.27 Abbott Nutrition 73.0 4.2 19.24 Gerber Products Co. 35.6 -25.0 17.72 Private label 12.9 -2.0 17.74 Nestle USA 1.9 7.8 17.49 \$ SALES CHANGE VS. TOP BRANDS (MILLIONS) YEAR AGO SHARE Similac Advance \$791.0 25.6% 20.7% Enfamil Premium 602.0 8.6 15.8 Gerber Good Start Gentle 372.7 -25.0 9.8 Enfamil Gentlelease 359.2 23.9 9.4 Similac Sensitive 298.1 -30.7 7.8 Private label 228.5 3.4 6.0 Enfamil Nutramigen 141.7 11.3 3.7 Gerber Good Start Soothe 140.7 -2.6 3.7 Enfagrow Premium 130.0 10.9 3.4 Enfamil Prosobee 98.2 0.3 2.6 CATEGORY TOTAL 3,821.2 3.0 100.0 UNIT SALES CHANGE VS. AVG. PRICE TOP BRANDS (MILLIONS) YEAR AGO PER UNIT Similac Advance 43.9 26.6% \$18.03 Enfamil Premium 32.0 9.6 18.80 Gerber Good Start Gentle 21.3 -28.4 17.54 Enfamil Gentlelease 17.4 25.2 20.63 Similac Sensitive 15.1 -35.9 19.80 Private label 12.9 -2.0 17.74 Enfamil Nutramigen 5.2 8.3 27.21 Gerber Good Start Soothe 7.8 -7.4 18.15 Enfagrow Premium 5.8 14.0 22.28 Enfamil Prosobee 5.1 -0.5 19.31 CATEGORY TOTAL 198.2 0.2 19.28 TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25. Source: IRI BABY FORMULA--RTD Three of the top four brands were Similac products, accounting for nearly 60% of dollar sales. Enfamil Premium placed third with 16% of dollars. Overall, category dollars were flat while units were down 3.3%. \$ SALES CHANGE VS. TOP VENDORS (MILLIONS) YEAR AGO SHARE Abbott Nutrition \$150.8 0.8% 68.3% Mead Johnson Nutrition 62.6 2.9 28.3 Gerber Products Co. 6.9 -29.2 3.1 Private label 0.4 -25.4 0.2 Nestle Healthcare Nutrition 0.1 66.6 0.1 UNIT SALES CHANGE VS. AVG. PRICE TOP VENDORS (MILLIONS) YEAR AGO PER UNIT Abbott Nutrition 17.1 -1.2% \$8.83 Mead Johnson Nutrition 6.7 -2.8 9.37 Gerber Products Co. 1.0 -30.8 6.92 Private label 0.0 -37.7 9.00 Nestle Healthcare Nutrition 0.0 91.7 3.70 \$ SALES CHANGE VS. TOP BRANDS (MILLIONS) YEAR AGO SHARE Similac Advance \$68.5 -0.8% 31.0% Similac Sensitive 40.9 1.2 18.5 Enfamil Premium 35.3 -4.6 16.0

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Similac Expert Care Alimentum 20.1 6.7 9.1 Enfamil Gentlelease 15.4 9.7 7.0 Similac 8.4 26.6 3.8 Similac Isomil 7.1 -16.4 3.2 Gerber Good Start Gentle 5.9 -29.9 2.7 Similac Expert Care Neosure 5.2 2.1 2.3 Enfamil Prosobee 3.4 13.7 1.6 CATEGORY TOTAL 220.9 0.1 100.0 UNIT SALES CHANGE VS. AVG. PRICE TOP BRANDS (MILLIONS) YEAR AGO PER UNIT Similac Advance 7.7 0.1% \$8.85 Similac Sensitive 4.5 -4.1 9.01 Enfamil Premium 4.0 -4.2 8.93 Similac Expert Care Alimentum 2.0 2.3 10.02 Enfamil Gentlelease 1.4 -9.2 10.65 Similac 1.2 20.7 7.15 Similac Isomil 1.0 -19.7 7.31 Gerber Good Start Gentle 0.9 -31.7 6.96 Similac Expert Care Neosure 0.6 -2.7 8.43 Enfamil Prosobee 0.4 3.1 8.79 CATEGORY TOTAL 24.9 -3.3 8.89 TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25. Source: IRI BABY FORMULA--LIQUID CONCENTRATE Liquid concentrate baby formula continues to falter as dollars were down almost 25%, after being down almost 20% the year prior. Unit sales were similarly off. Similac, Enfamil and Gerber are the main players in the category. \$ SALES CHANGE VS. TOP VENDORS (MILLIONS) YEAR AGO SHARE Abbott Nutrition \$33.9 -30.6% 40.9% Mead Johnson Nutrition 30.7 -11.3 37.0 Gerber Products Co. 16.9 -32.4 20.4 Wellements Co. 0.9 -22.1 1.1 Private label 0.5 19.6 0.6 UNIT SALES CHANGE VS. AVG. PRICE TOP VENDORS (MILLIONS) YEAR AGO PER UNIT Abbott Nutrition 6.5 -29.5% \$5.20 Mead Johnson Nutrition 5.6 -11.0 5.53 Gerber Products Co. 3.3 -33.8 5.07 Wellements Co. 0.1 -27.0 10.18 Private label 0.1 18.5 9.90 \$ SALES CHANGE VS. TOP BRANDS (MILLIONS) YEAR AGO SHARE Similac Advance \$25.1 0.6% 30.2% Enfamil Premium 21.8 -8.9 26.3 Gerber Good Start Gentle 12.6 -35.0 15.2 Similac Isomil 5.5 19.4 6.6 Enfamil Prosobee 5.2 -13.6 6.3 Gerber Good Start Soy 4.3 -23.7 5.2 Enfamil Nutramigen Lipil 3.6 -20.3 4.4 Similac Sensitive 3.2 -83.0 3.9 Wellements Baby Move Constpn 0.9 -22.1 1.1 Private label 0.5 19.6 0.6 CATEGORY TOTAL 83.0 -24.7 100.0 UNIT SALES CHANGE VS. AVG. PRICE TOP BRANDS (MILLIONS) YEAR AGO PER UNIT Similac Advance 4.8 0.9% \$5.23 Enfamil Premium 4.1 -8.8 5.33 Gerber Good Start Gentle 2.5 -36.2 5.07 Similac Isomil 1.0 19.2 5.45 Enfamil Prosobee 1.0 -13.9 5.20 Gerber Good Start Soy 0.8 -25.4 5.08 Enfamil Nutramigen Lipil 0.4 -22.2 8.07 Similac Sensitive 0.7 -80.4 4.56 Wellements Baby Move Constpn 0.1 -27.0 10.18 Private label 0.1 18.5 9.90 CATEGORY TOTAL 15.6 -24.8 5.33 TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25. Source: IRI WHITE GRANULATED SUGAR A 29-cent decrease in average price no doubt contributed to category dollars being down 11.7%, while units were only down 1.9%. Domino was the only national brand with double-digit dollar share (18.2%). Private label had a 54.6% market share, but also had the biggest dollar decrease, down 15.4%. \$ SALES CHANGE VS. TOP VENDORS (MILLIONS) YEAR AGO SHARE Private label \$754.4 -15.4% 54.6% Domino Foods 254.7 -10.5 18.4 C & H Sugar Co. 130.0 -13.9 9.4 Imperial Sugar Co. 95.5 -13.3 6.9 Cumberland Packing Corp. 40.6 6.2 2.9 UNIT SALES CHANGE VS. AVG. PRICE TOP VENDORS (MILLIONS) YEAR AGO PER UNIT Private label 309.6 -1.7% \$2.44 Domino Foods 91.3 -2.5 2.79 C & H Sugar Co. 47.2 -7.6 2.75 Imperial Sugar Co. 36.5 -10.1 2.62 Cumberland Packing Corp. 11.4 1.8 3.55 \$ SALES CHANGE VS. TOP BRANDS (MILLIONS) YEAR AGO SHARE Private label \$754.4 -15.4% 54.6% Domino 251.9 -10.5 18.2 C&H 130.0 -13.9 9.4 Dixie Crystals 49.7 -6.0 3.6 Sugar in the Raw 40.6 6.2 2.9 Imperial Sugar 36.4 -14.8 2.6 Crystal Sugar 30.3 80.2 2.2 Zulka 14.9 2.2 1.1 Florida Crystals 12.7 0.2 0.9 N joy 10.2 -5.4 0.7 CATEGORY TOTAL 1,381.3 -11.7 100.0 UNIT SALES CHANGE VS. AVG. PRICE TOP BRANDS (MILLIONS) YEAR AGO PER UNIT Private label 309.6 -1.7% \$2.44 Domino 89.7 -2.5 2.81 C&H 47.2 -7.6 2.75 Dixie Crystals 18.7 -5.7 2.66 Sugar in the Raw 11.4 1.8 3.55 Imperial Sugar 12.8 -9.3 2.85 Crystal Sugar 7.2 57.2 4.19 Zulka 7.6 7.3 1.95 Florida Crystals 3.3 -0.5 3.77 N joy 1.1 -1.0 9.01 CATEGORY TOTAL 529.9 -1.9 2.61 TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25 Source: IRI MARGARINE/SPREADS With the No. 1 (Shedd's Country Crock) and No. 2 (I Can't Believe It's Not Butter) brands in the category, Unilever is the clear leader with 58.1% of dollars. Once again the category struggled, down more than 3% in dollars and more than 4% in units. \$ SALES CHANGE VS. TOP VENDORS (MILLIONS) YEAR AGO SHARE Unilever Bestfoods N Amer \$922.7 0.2% 58.1% ConAgra Foods 289.0 -5.3 18.2 Boulder Brands 163.7 -15.1 10.3 Private label 82.5 -8.9 5.2 Land O' Lakes 42.5 -12.3 2.6 UNIT SALES CHANGE VS. AVG. PRICE TOP VENDORS (MILLIONS) YEAR AGO PER UNIT Unilever Bestfoods N Amer 357.0 0.3% \$2.58 ConAgra Foods 194.2 -7.8 1.49 Boulder Brands 49.6 -17.3 3.30 Private label 50.3 -10.2 1.64 Land O' Lakes 20.0 -11.8 2.13 \$ SALES CHANGE VS. TOP BRANDS (MILLIONS) YEAR AGO SHARE Shedd's Country Crock \$404.9 3.9% 25.5% I Can't Believe It's Not Butter 258.9 -1.9 16.3 Blue Bonnet 184.1 -3.2 11.6 Smart Balance 160.0 -14.8 10.0 Imperial 93.5 6.2 5.8 Private label 82.5 -8.9

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5.2 I Cant Believe It's Not Butter 67.1 -7.6 4.2 Lt Parkay 62.7 -8.8 3.9 Brummel & Brown 41.0 -7.9 2.5 Earth Balance 34.3 25.8 2.1 CATEGORY TOTAL 1,587.8 -3.3 100.0 UNIT SALES CHANGE VS. AVG. PRICE TOP BRANDS (MILLIONS) YEAR AGO PER UNIT Shedd's Country Crock 133.5 3.5% \$3.03 I Can't Believe It's Not Butter 77.9 -3.1 3.32 Blue Bonnet 134.0 -8.0 1.37 Smart Balance 48.1 -17.0 3.32 Imperial 89.2 5.9 1.05 Private label 50.3 -10.2 1.64 I Can't Believe It's Not Butter 21.8 -9.7 3.07 Lt Parkay 30.7 -10.0 2.04 Brummel & Brown 13.6 -8.9 3.02 Earth Balance 8.2 26.8 4.15 CATEGORY TOTAL 705.8 -4.5 2.25 TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25. Source: IRI REFRIGERATED BUTTER/BUTTER BLENDS Price increases led a 17.3% rise in dollars despite units being off almost 2%. Top national brand Land O' Lakes (31.4% of dollars, up 5.6% in units) closed the gap on private label (48.3%, down 6.3% in units) for the No. 1 spot overall. \$ SALES CHANGE VS. TOP VENDORS (MILLIONS) YEAR AGO SHARE Private label \$1,259.5 16.4% 48.3% Land O' Lakes 832.5 18.1 31.9 Challenge Dairy Products 127.3 34.4 4.9 Keller's Creamery 68.4 -0.2 2.6 Irish Dairy Board 42.2 70.2 1.6 UNIT SALES CHANGE VS. AVG. PRICE TOP VENDORS (MILLIONS) YEAR AGO PER UNIT Private label 353.2 -6.3% \$3.57 Land O' Lakes 229.3 4.8 3.63 Challenge Dairy Products 35.1 15.0 3.63 Keller's Creamery 21.7 -16.7 3.16 Irish Dairy Board 11.5 68.7 3.67 \$ SALES CHANGE VS. TOP BRANDS (MILLIONS) YEAR AGO SHARE Private label \$1,259.5 16.4% 48.3% Land O' Lakes 819.9 19.2 31.4 Challenge Butter 119.6 34.9 4 6 Kerrygold 42.2 70.2 1.6 Breakstone's 38.8 11.0 1.5 Tillamook 36.7 5.1 1.4 Crystal Farms 30.9 3.9 1.2 Cabot 27.7 11.0 1.1 Keller's 17.1 -1.2 0.7 Darigold 16.6 -7.6 0.6 CATEGORY TOTAL 2,609.1 17.3 100.0 UNIT SALES CHANGE VS. AVG. PRICE TOP BRANDS (MILLIONS) YEAR AGO PER UNIT Private label 353.2 -6.3% \$3.57 Land O' Lakes 225.2 5.6 3.64 Challenge Butter 33.3 15.3 3.59 Kerrygold 11.5 68.7 3.67 Breakstone's 13.2 -4.2 2.93 Tillamook 9.2 -17.0 3.97 Crystal Farms 8.9 -14.3 3.49 Cabot 7.7 -4.7 3.61 Keller's 4.9 -19.0 3.48 Darigold 4.7 -29.0 3.54 CATEGORY TOTAL 725.9 -1.8 3.59 TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25. Source: IRI LIQUID LAUNDRY DETERGENT Church & Dwight had a good year and was the only vendor with an increase in sales. However, No. 1 vendor Procter & Gamble is still the clear leader in the category with more than 56.6% dollar share. Overall the category topped \$5.1 billion, down 3.9%. \$ SALES CHANGE VS. TOP VENDORS (MILLIONS) YEAR AGO SHARE Procter & Gamble \$2,923.6 -4.9% 56.6% Church & Dwight Co. 889.2 1.8 17.2 The Sun Products Corp. 715.2 -5.9 13.9 The Dial Corp. 370.8 -4.3 7.2 Private label 125.5 -11.6 2.4 UNIT SALES CHANGE VS. AVG. PRICE TOP VENDORS (MILLIONS) YEAR AGO PER UNIT Procter & Gamble 299.2 1.8% \$9.77 Church & Dwight Co. 184.1 1.4 4.83 The Sun Products Corp. 116.8 -7.2 6.12 The Dial Corp. 83.0 -3.0 4.47 Private label 21.5 -10.5 5.84 \$ SALES CHANGE VS. TOP BRANDS (MILLIONS) YEAR AGO SHARE Tide \$1,129.0 -11.0% 21.9% Gain 518.1 -11.7 10.0 All 303.1 -3.2 5.9 Arm & Hammer 271.1 -1.7 5.3 Tide Plus A Touch of Downy 250.6 6.9 4.9 Purex 226.8 -10.6 4.4 Tide Plus Febreze 220.5 -24.6 4.3 Tide Simply Clean and Fresh 167.5 22,030.4 3.2 Arm & Hammer Plus Oxi Clean 163.5 -3.1 3.2 Xtra 162.1 -8.7 3.1 CATEGORY TOTAL 5,162.2 -3.9 100.0 UNIT SALES CHANGE VS. AVG. PRICE TOP BRANDS (MILLIONS) YEAR AGO PER UNIT Tide 104.4 -8.4% \$10.81 Gain 52.6 -12.6 9.86 All 40.4 -4.9 7.50 Arm & Hammer 50.7 2.1 5.35 Tide Plus A Touch of Downy 24.6 23.6 10.20 Purex 50.3 -11.5 4.51 Tide Plus Febreze 20.8 -19.7 10.61 Tide Simply Clean and Fresh 29.7 21,352.0 5.64 Arm & Hammer Plus Oxi Clean 31.1 3.2 5.25 Xtra 45.7 -11.4 3.55 CATEGORY TOTAL 734.6 -1.2 7.03 TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25. Source: IRI PAPER TOWELS The almost \$ 5 billion category was basically flat in dollars, down 2.3 in units. Bounty products took the top two nationally branded spots, while Sparkle brands were third and fourth. Procter & Gamble had 44% dollar share, followed by private label at 27.1%. \$ SALES CHANGE VS. TOP VENDORS (MILLIONS) YEAR AGO SHARE Procter & Gamble \$2,155.1 -1.9% 44.0% Private label 1,326.0 1.7 27.1 Georgia-Pacific Consumer Prds 829.8 1.1 16.9 Kimberly Clark Corp. 507.9 5.4 10.4 Oasis Brands 29.7 43.3 0.6 UNIT SALES CHANGE VS. AVG. PRICE TOP VENDORS (MILLIONS) YEAR AGO PER UNIT Procter & Gamble 292.4 -5.3% \$7.37 Private label 458.4 -3.5 2.89 Georgia-Pacific Consumer Prds 157.2 -1.1 5.28 Kimberly Clark Corp. 99.3 10.2 5.11 Oasis Brands 9.4 41.7 3.14 \$ SALES CHANGE VS. TOP BRANDS (MILLIONS) YEAR AGO SHARE Private label \$1,326.0 1.7% 27.1% Bounty Select A Size 1,182.8 7.3 24.2 Bounty 616.1 -15.9 12.6 Sparkle 253.1 -11.6 5.2 Sparkle Pick A Size 234.9 21.7 4.8 Brawny Pick A Size 171.7 -5.2 3.5 Bounty Basic 165.8 -17.3 3.4 Scott Choose A Size 160.1 3.9 3.3 Kleenex Viva Choose A Size 124.5 -6.9 2.5 Bounty Basic Select A Size

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111.4 36.3 2.3 CATEGORY TOTAL 4,895.6 0.2 100.0 UNIT SALES CHANGE VS. AVG. PRICE TOP BRANDS (MILLIONS) YEAR AGO PER UNIT Private label 458.4 -3.5% \$2.89 Bounty Select A Size 130.4 4.2 9.07 Bounty 78.1 -22.5 7.89 Sparkle 69.0 -12.7 3.67 Sparkle Pick A Size 41.2 37.8 5.70 Brawny Pick A Size 28.7 -7.0 5.97 Bounty Basic 54.7 -2.2 3.03 Scott Choose A Size 28.3 1.9 5.66 Kleenex Viva Choose A Size 22.3 -2.0 5.58 Bounty Basic Select A Size 14.3 45.2 7.76 CATEGORY TOTAL 1,039.5 -2.3 4.71 TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25. Source: IRI DISH DETERGENT Procter & Gamble captured more than half of category dollars between its Dawn (No. 1 brand), Gain (No. 4), Ivory (No. 9) and Joy (No. 10) products. Colgate Palmolive held the second vendor spot on the strength of its Palmolive and Ajax brands. Category sales topped \$1.5 billion, up .3%. \$ SALES CHANGE VS. TOP VENDORS (MILLIONS) YEAR AGO SHARE Procter & Gamble \$872.6 1.4% 55.5% Colgate Palmolive Co. 509.0 -1.7 32.4 Private label 87.6 7.2 5.5 Seventh Generation 21.1 23.0 1.3 Phoenix Brands 19.3 -0.3 1.2 UNIT SALES CHANGE VS. AVG. PRICE TOP VENDORS (MILLIONS) YEAR AGO PER UNIT Procter & Gamble 334.8 -0.1% \$2.61 Colgate Palmolive Co. 234.8 -1.6 2.17 Private label 41.7 -0.6 2.10 Seventh Generation 6.4 22.5 3.29 Phoenix Brands 18.7 0.7 1.03 \$ SALES CHANGE VS. TOP BRANDS (MILLIONS) YEAR AGO SHARE Dawn \$607.0 0.4% 38.6% Palmolive 188.4 0.1 12.0 Ajax 186.4 3.6 11.8 Gain 102.2 -6.5 6.5 Private label 87.6 7.2 5.5 Palmolive Soft Touch 33.8 -2.3 2.1 Ajax Triple Action 31.8 -7.5 2.0 Dawn Power Clean 26.0 23.0 1.6 Ivory 25.1 -2.9 1.6 CATEGORY TOTAL 1,570.6 0.3 100.0 UNIT SALES CHANGE VS. AVG. PRICE TOP BRANDS (MILLIONS) YEAR AGO PER UNIT Dawn 227.3 0.9% \$2.67 Palmolive 81.2 -0.8 2.32 Ajax 88.1 0.8 2.11 Gain 49.5 -10.0 2.06 Private label 41.7 -0.6 2.10 Palmolive Soft Touch 15.4 -1.7 2.19 Ajax Triple Action 15.9 -7.9 2.00 Dawn Power Clean 9.6 31.6 2.70 Ivory 8.2 -2.9 3.04 CATEGORY TOTAL 666.4 -1.0 2.36 TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25. Source: IRI TOILET TISSUE In a category with nearly 100% household penetration, all vendors can do is really jockey for position. Procter & Gamble held onto the top spot, but it was a dead heat for second between Kimberly Clark and Georgia-Pacific. Store brands continue to do well, up almost 3% in dollars with nearly 20% market share. \$ SALES CHANGE VS. TOP VENDORS (MILLIONS) YEAR AGO SHARE Procter & Gamble \$2,428.8 0.0% 28.6% Kimberly Clark Corp. 2,117.9 0.4 24.9 Georgia-Pacific Cnsumr Prds 2,115.7 -2.7 24.9 Private label 1,676.5 2.9 19.7 Oasis Brands 71.2 32.4 0.8 UNIT SALES CHANGE VS. AVG. PRICE TOP VENDORS (MILLIONS) YEAR AGO PER UNIT Procter & Gamble 255.9 -3.1% \$9.49 Kimberly Clark Corp. 309.4 1.0 6.85 Georgia-Pacific Cnsumr Prds 341.3 -1.3 6.20 Private label 404.4 -4.6 4.15 Oasis Brands 18.0 27.6 3.97 \$ SALES CHANGE VS. TOP BRANDS (MILLIONS) YEAR AGO SHARE Private label \$1,676.5 2.9% 19.7% Angel Soft 1,162.1 -3.0 13.7 Charmin Ultra Soft 1,076.9 0.0 12.7 Charmin Ultra Strong 1,001.6 4.9 11.8 Scott 929.1 0.3 10.9 Quilted Nrthrn Ultra sft & 545.4 25.9 6.4 strng Kleenex Cottonelle Clean Care 445.5 -1.6 5.2 Charmin Basic 311.0 -11.8 3.7 Kleenex Ctonlle Ultra Cmfrt Cr 301.1 62.8 3.5 Scott Extra Soft 298.9 7.4 3.5 CATEGORY TOTAL 8,491.9 0.2 100.0 UNIT SALES CHANGE VS. AVG. PRICE TOP BRANDS (MILLIONS) YEAR AGO PER UNIT Private label 404.4 -4.6% \$4.15 Angel Soft 229.5 -1.0 5.06 Charmin Ultra Soft 103.5 -3.6 10.41 Charmin Ultra Strong 94.7 0.6 10.57 Scott 143.8 -0.1 6.46 Quilted Nrthrn Ultra sft & 65.0 20.8 8.39 strng Kleenex Cottonelle Clean Care 61.2 -1.5 7.28 Charmin Basic 52.7 -7.8 5.90 Kleenex Ctonlle Ultra Cmfrt Cr 38.7 60.5 7.79 Scott Extra Soft 42.6 9.3 7.02 CATEGORY TOTAL 1,355.4 -1.9 6.27 TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25. Source: IRI FACIAL TISSUE Five varieties of the Kleenex brand, essentially synonymous with facial tissue, provided Kimberly Clark with 45.9% of category sales. Procter & Gamble's Puff brand lofted the Cincinnati-based manufacturer to second spot with 26% of dollars. Overall, category dollars were down 0.3% totaling more than \$1.5 billion. \$ SALES CHANGE VS. TOP VENDORS (MILLIONS) YEAR AGO SHARE Kimberly Clark Corp. \$724.3 -1.6% 45.9% Procter & Gamble 410.4 -1.3 26.0 Private label 370.6 3.9 23.4 Irving Tissue Converters 51.7 -3.5 3.2 Georgia Pacific Consumer Prod 13.5 -6.0 0.8 UNIT SALES CHANGE VS. AVG. PRICE TOP VENDORS (MILLIONS) YEAR AGO PER UNIT Kimberly Clark Corp. 295.9 -6.4% \$2.45 Procter & Gamble 154.0 0.6 2.66 Private label 225.4 1.0 1.64 Irving Tissue Converters 40.2 0.5 1.29 Georgia Pacific Consumer Prod 8.7 11.9 1.54 \$ SALES CHANGE VS. TOP BRANDS (MILLIONS) YEAR AGO SHARE Kleenex \$510.7 -1.4% 32.3% Private label 370.6 3.9 23.4 Puffs Plus Lotion 200.0 -3.9 12.6 Kleenex Ultra 154.5 4.2 9.7 Puffs Ultra 90.0 3.6 5.7 Puffs Basic 86.4 -3.7 5.4 Scotties 51.7 -3.5 3.2 Kleenex Anti Viral 21.8 6.6 1.3 Kleenex Cool Touch 19.1 -26.8 1.2 Kleenex Expressions 16.4 -17.9 1.0 CATEGORY

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TOTAL 1,578.1 -0.3 100.0 UNIT SALES CHANGE VS. AVG. PRICE TOP BRANDS (MILLIONS) YEAR AGO PER UNIT Kleenex 211.5 -7.0% \$2.41 Private label 225.4 1.0 1.64 Puffs Plus Lotion 78.7 0.5 2.54 Kleenex Ultra 55.3 -1.4 2.79 Puffs Ultra 35.8 4.1 2.51 Puffs Basic 32.7 -6.6 2.64 Scotties 40.2 0.5 1.29 Kleenex Anti Viral 9.6 7.9 2.26 Kleenex Cool Touch 10.0 -20.0 1.91 Kleenex Expressions 8.9 -15.5 1.84 CATEGORY TOTAL 731.3 -2.0 2.16 TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25. Source: IRI PAPER NAPKINS Paper napkin dollars and units were both down, 3.6% and 3.9% respectively. Store brands were the most popular choice, with 43.2% of dollars, a slight improvement versus last year. The top two national brands, Vanity' Fair and Bounty Quilted also showed gains versus last year. \$ SALES CHANGE VS. TOP VENDORS (MILLIONS) YEAR AGO SHARE Private label \$306.5 1.7% 43.2% Georgia Pacific Consumer Prod 181.4 -5.6 25.6 Procter & Gamble 98.3 -5.1 13.8 Kimberly-Clark Corp. 30.0 -15.8 4.2 Creative Converting 18.7 16.6 2.6 UNIT SALES CHANGE VS. AVG. PRICE TOP VENDORS (MILLIONS) YEAR AGO PER UNIT Private label 149.0 -1.6% \$2.06 Georgia Pacific Consumer Prod 52.3 -1.3 3.47 Procter & Gamble 27.4 -6.8 3.58 Kimberly-Clark Corp. 10.2 -14.4 2.94 Creative Converting 13.0 19.4 1.44 \$ SALES CHANGE VS. TOP BRANDS (MILLIONS) YEAR AGO SHARE Private label \$306.5 1.7% 43.2% Vanity Fair 109.0 0.8 15.3 Bounty Quilted 87.7 1.2 12.3 Kleenex 28.6 -9.6 4.0 Marathon 25.1 -4.3 3.5 Mardi Gras 24.2 -1.0 3.4 Dixie 21.0 -33.6 2.9 Bounty 10.1 -35.5 1.4 Party Creations 7.0 30.4 0.9 CATEGORY TOTAL 708.3 -3.7 100.00 UNIT SALES CHANGE VS. AVG. PRICE TOP BRANDS (MILLIONS) YEAR AGO PER UNIT Private label 149.0 -1.6% \$2.06 Vanity Fair 36.2 1.8 3.01 Bounty Quilted 26.1 -2.5 3.35 Kleenex 9.9 -9.7 2.88 Marathon 1.5 -4.5 16.26 Mardi Gras 9.4 -0.8 2.56 Dixie 4.6 -19.1 4.51 Bounty 1.1 -50.0 9.16 Party Creations 6.0 32.0 1.16 CATEGORY TOTAL 294.0 -3.9 2.41 TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25. Source: IRI PEANUT BUTTER The top three brands were up in units, though down in dollars. JIF was No. 1 with more than a 36% of dollar share. Store brands were second at 19.2% and Skippy was third. Overall category dollars sales approached \$2 billion, down 4.2%. \$ SALES CHANGE VS. TOP VENDORS (MILLIONS) YEAR AGO SHARE The J.M. Smucker Co. \$889.6 -3.3% 46.3% Private label 368.4 -3.2 19.2 Hormel Foods 333.3 -1.2 17.4 ConAgra Foods 187.6 -10.5 9.8 Boulder Brands 23.2 -11.0 1.2 UNIT SALES CHANGE VS. AVG. PRICE TOP VENDORS (MILLIONS) YEAR AGO PER UNIT The J.M. Smucker Co. 229.0 2.0% \$3.88 Private label 128.7 3.9 2.86 Hormel Foods 90.8 4.1 3.67 ConAgra Foods 58.3 -9.0 3.22 Boulder Brands 6.3 -8.8 3.68 \$ SALES CHANGE VS. TOP BRANDS (MILLIONS) YEAR AGO SHARE JIF \$697.5 -4.2% 36.3% Private label 368.4 -3.2 19.2 Skippy 233.4 -2.1 12.2 Peter Pan 182.9 -10.0 9.5 Skippy Natural 88.1 4.0 4.6 Smucker's 57.6 -4.5 3.0 JIF To Go 29.2 -2.8 1.5 Smucker's Goober 28.7 -4.7 1.5 Smart Balance 23.2 -11.0 1.2 Adams 20.1 -1.9 1.0 CATEGORY TOTAL 1,919.5 -4.2 100.0 UNIT SALES CHANGE VS. AVG. PRICE TOP BRANDS (MILLIONS) YEAR AGO PER UNIT JIF 168.9 1.6% \$4.13 Private label 128.7 3.9 2.86 Skippy 63.2 2.8 3.69 Peter Pan 56.5 -8.5 3.24 Skippy Natural 25.3 6.2 3.48 Smucker's 15.5 -4.3 3.71 JIF To Go 12.3 -6.3 2.37 Smucker's Goober 8.9 -2.9 3.21 Smart Balance 6.3 -8.8 3.68 Adams 4.4 -0.1 4.51 CATEGORY TOTAL 545.5 0.1 3.52 TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25. Source: IRI SS JAM/JELLY/PRESERVES With three Smucker's branded products in the top 10, The J.M. Smucker's Co. is far and away the top vendor with 44.4% dollar share. Private label beat out Welch Foods for second spot, 19.8% to 15.5%. Overall all category sales were \$922 million, down 2.2%. \$ SALES CHANGE VS. TOP VENDORS (MILLIONS) YEAR AGO SHARE The J.M. Smucker Co. \$409.0 -1.9% 44.4% Private label 182.7 -3.9 19.8 Welch Foods 142.9 -3.5 15.5 American Marketing Team 48.1 10.2 5.2 B & G Foods 37.3 -4.6 4.1 UNIT SALES CHANGE VS. AVG. PRICE TOP VENDORS (MILLIONS) YEAR AGO PER UNIT The J.M. Smucker Co. 142.7 -0.3% \$2.86 Private label 79.4 -3.5 2.30 Welch Foods 63.3 -3.4 2.26 American Marketing Team 11.0 8.7 4.36 B & G Foods 14.2 -3.9 2.63 \$ SALES CHANGE VS. TOP BRANDS (MILLIONS) YEAR AGO SHARE Smucker's \$311.8 1.1% 33.8% Private label 182.7 -3.9 19.8 Welch's 103.4 -3.1 11.2 Bonne Maman 48.1 10.2 5.2 Smucker's Sugar Free 37.8 -11.6 4.1 Smucker's Simply Fruit 28.8 -8.2 3.1 Polaner All Fruit 25.2 -4.2 2.7 Welch's Natural 22.0 -6.4 2.4 Bama 17.2 -3.1 1.9 Polaner 12.0 -5.2 1.3 CATEGORY TOTAL 922.1 -2.2 100.0 UNIT SALES CHANGE VS. AVG. PRICE TOP BRANDS (MILLIONS) YEAR AGO PER UNIT Smucker's 110.2 2.9% \$2.83 Private label 79.4 -3.5 2.30 Welch's 45.8 -2.5 2.26 Bonne Maman 11.0 8.7 4.36 Smucker's Sugar Free 12.7 -11.5 2.98 Smucker's Simply Fruit 11.1 -7.8 2.59 Polaner All Fruit 9.7 -3.2 2.59 Welch's Natural 7.8 -6.7 2.80 Bama 9.5 -5.9 1.80 Polaner 4.4 -5.3 2.70 CATEGORY TOTAL 341.1 -1.8 2.70

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TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25. Source: IRI BREAKFAST/CEREAL/SNACK BARS Kellogg's had 56.7% of dollars. No other vendor had 9%. General Mills did enjoy healthy gains however, up 19% and its Nature Valley brand was up 68.9%. Overall, category dollars totaled more than \$ 1 billion, down 3.4%. Units were down 2.7%. \$ SALES CHANGE VS. TOP VENDORS (MILLIONS) YEAR AGO SHARE Kellogg Co. \$606.5 -6.0% 56.7% General Mills 92.2 19.0 8.6 Private label 89.3 1.4 8.3 Small Planet Foods 82.0 19.1 7.7 Quaker Oats Co. 32.0 4.1 3.0 UNIT SALES CHANGE VS. AVG. PRICE TOP VENDORS (MILLIONS) YEAR AGO PER UNIT Kellogg Co. 199.7 -5.6% \$3.04 General Mills 31.1 13.3 2.97 Private label 42.6 2.2 2.10 Small Planet Foods 48.5 16.0 1.69 Quaker Oats Co. 9.5 -4.0 3.37 \$ SALES CHANGE VS. TOP BRANDS (MILLIONS) YEAR AGO SHARE Kellogg's Nutri Grain Bars \$193.7 -1.3% 18.1% Kellogg's Rice Krispies Treats 177.7 3.5 16.6 Kellogg's Special K Pstry Crsp 111.3 -28.4 10.4 Private label 89.3 1.4 8.3 Kellogg's Special K Bar 78.9 -32.5 7.4 Larabar 65.9 21.6 6.2 Nature Valley 57.0 68.9 5.3 Atkins Day Break 31.1 -24.7 2.9 Kellogg's Nutri Grain Harvest 18.2 2,526.1 1.7 Quaker Real Medleys 16.9 27.1 1.6 CATEGORY TOTAL 1,069.8 -3.4 100.0 UNIT SALES CHANGE VS. AVG. PRICE TOP BRANDS (MILLIONS) YEAR AGO PER UNIT Kellogg's Nutri Grain Bars 60.6 -2.4% \$3.20 Kellogg's Rice Krispies Treats 59.3 -0.8 3.00 Kellogg's Special K Pstry Crsp 36.7 -28.1 3.03 Private label 42.6 2.2 2.10 Kellogg's Special K Bar 26.1 -29.7 3.02 Larabar 40.1 17.2 1.64 Nature Valley 17.0 66.1 3.35 Atkins Day Break 5.3 -23.1 5.88 Kellogg's Nutri Grain Harvest 6.7 2,315.1 2.72 Quaker Real Medleys 5.3 -9.0 3.17 CATEGORY TOTAL 390.4 -2.7 2.74 TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25. Source: IRI PRETZELS Pretzel dollar sales dipped below the \$ 1 billion mark. Snyder's-Lance is far and away the category leader with more than 40% of the dollars, led primarily by its Snyder's of Hanover brand. Store brands and Frito Lay's Rold Gold were the only other two brands in double-digits. \$ SALES CHANGE VS. TOP VENDORS (MILLIONS) YEAR AGO SHARE Snyder's-Lance \$403.1 0.3% 40.7% Private label 171.4 11.7 17.3 Frito Lay 164.0 -11.3 16.6 Utz Quality Foods 76.1 -5.3 7.7 Mars 47.2 -0.4 4.8 UNIT SALES CHANGE VS. AVG. PRICE TOP VENDORS (MILLIONS) YEAR AGO PER UNIT Snyder's-Lance 133.6 -1.4% \$3.02 Private label 83.0 5.1 2.07 Frito Lay 57.9 -12.0 2.83 Utz Quality Foods 22.1 -5.6 3.45 Mars 22.0 -3.6 2.14 \$ SALES CHANGE VS. TOP BRANDS (MILLIONS) YEAR AGO SHARE Snyder's of Hanover \$381.4 -1.2% 38.5% Private label 171.4 11.7 17.3 Rold Gold 164.0 -11.3 16.6 Utz 67.8 -5.2 6.8 Combos 47.2 -0.4 4.8 Snyder's of Hanover 100 Cal Pck 17.5 11.1 1.8 Glutino 14.5 -19.1 1.5 Bachman 14.3 3.4 1.4 Herr's 13.4 -38.3 1.4 Anderson 13.4 -19.8 1.4 CATEGORY TOTAL 990.5 -1.7 100.0 UNIT SALES CHANGE VS. AVG. PRICE TOP BRANDS (MILLIONS) YEAR AGO PER UNIT Snyder's of Hanover 128.2 -2.8% \$2.98 Private label 83.0 5.1 2.07 Rold Gold 57.9 -12.0 2.83 Utz 19.7 -5.0 3.44 Combos 22 0 -3.6 2.14 Snyder's of Hanover 100 Cal Pck 4.0 11.1 4.41 Glutino 2.8 -12.0 5.12 Bachman 5.3 4.2 2.68 Herr's 4.6 -23.8 2.90 Anderson 3.0 -21.5 4.44 CATEGORY TOTAL 367.0 -2.7 2.70 TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25. Source: IRI POTATO CHIPS Frito Lay holds down the top three branded spots with its Lays, Wavy Lays and Ruffles brands. In total Frito Lay accounts for 60% of potato chips dollar sales. Overall it was a good year for the category as dollars were up 4.1% accounting for more than \$5.6 billion. Unit sales were also up a healthy 4%. \$ SALES CHANGE VS. TOP VENDORS (MILLIONS) YEAR AGO SHARE Frito Lay \$3,415.0 4.5% 60.0% Kellogg Co. 598.5 -1.1 10.5 Private label 451.6 7.5 7.9 Utz Quality Foods 224.5 4.9 3.9 Cape Cod Potato Chip 185.9 21.3 3.3 UNIT SALES CHANGE VS. AVG. PRICE TOP VENDORS (MILLIONS) YEAR AGO PER UNIT Frito Lay 1,388.5 4.5% \$2.46 Kellogg Co. 361.7 -0.4 1.65 Private label 236.9 9.7 1.91 Utz Quality Foods 117.5 3.7 1.91 Cape Cod Potato Chip 61.1 20.8 3.04 \$ SALES CHANGE VS. TOP BRANDS (MILLIONS) YEAR AGO SHARE Lays \$1,650.2 4.0% 29.0% Wavy Lays 540.7 8.2 9.5 Ruffles 521.5 12.4 9.2 Pringles 514.4 1.2 9.0 Private label 451.6 7.5 7.9 Lays Kettle Cooked 287.1 11.0 5.0 Cape Cod 185.9 21.3 3.3 Utz 184.1 3.7 3.2 Kettle 147.9 10 8 2.6 Baked Lays 85.1 -4.0 1.5 CATEGORY TOTAL 5,688.7 4.1 100.0 UNIT SALES CHANGE VS. AVG. PRICE TOP BRANDS (MILLIONS) YEAR AGO PER UNIT Lays 693.5 2.2% \$2.38 Wavy Lays 193.8 6.8 2.79 Ruffles 199.5 13.0 2.61 Pringles 332.8 1.8 1.55 Private label 236.9 9.7 1.91 Lays Kettle Cooked 105.9 11.2 2.71 Cape Cod 61.1 20.8 3.04 Utz 102.1 2.8 1.80 Kettle 56.6 10.6 2.62 Baked Lays 30.7 9.4 2.77 CATEGORY TOTAL 2,547.1 4.0 2.23 TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25. Source: IRI TORTILLA/TOSTADA CHIPS Doritos continues

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to grow. The No. 1 brand in the category was up almost 9%, improving its dollar share to 35%. Frito Lays' Tostitos and Tostitos Scoops were the No. 2 and No. 3 brands, up 1.6% and 4.7% respectively. On the Border was up 19.3% the biggest gain in the category. \$ SALES CHANGE VS. TOP VENDORS (MILLIONS) YEAR AGO SHARE Frito Lay \$2,774.9 2.1% 72.0% Private label 197.7 1.9 5.1 Truco Enterprises 142.2 19.2 3.7 Mission Foods 108.6 -4.8 2.8 Barcel USA 86.1 2.3 2.2 UNIT SALES CHANGE VS. AVG. PRICE TOP VENDORS (MILLIONS) YEAR AGO PER UNIT Frito Lay 1,033.4 3.2% \$2.69 Private label 103.4 0.6 1.91 Truco Enterprises 47.7 20.5 2.98 Mission Foods 39.2 -4.8 2.77 Barcel USA 37.2 -3.8 2.31 \$ SALES CHANGE VS. TOP BRANDS (MILLIONS) YEAR AGO SHARE Doritos \$1,348.9 8.9% 35.0% Tostitos 601.2 1.6 15.6 Tostitos Scoops 421.2 4.7 10.9 Santitas 237.5 -1.2 6.2 Private label 197.7 1.9 5.1 On the Border 142.0 19.3 3.7 Mission 107.1 -5.6 2.8 Barcel Takis Fuego 77.2 1.2 2.0 Calidad 67.3 10.3 1.7 Doritos Jacked 43.6 -28.5 1.1 CATEGORY TOTAL 3,853.9 3.7 100.0 UNIT SALES CHANGE VS. AVG. PRICE TOP BRANDS (MILLIONS) YEAR AGO PER UNIT Doritos 542.7 8.5% \$2.49 Tostitos 187.7 4.5 3.20 Tostitos Scoops 125.5 7.3 3.36 Santitas 116.2 -0.4 2.04 Private label 103.4 0.6 1.91 On the Border 47.6 20.9 2.98 Mission 38.8 -5.3 2.76 Barcel Takis Fuego 32.3 -5.7 2.39 Calidad 36.8 12.0 1.83 Doritos Jacked 16.6 -26.2 2.63 CATEGORY TOTAL 1,472.1 4.6 2.62 TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25. Source: IRI CONDENSED WET SOUP It is soup giant Campbell's category. The Camden, N.J.-based company and its various brands control 82.3% of dollar sales, accounting for nearly \$1.3 billion. Campbell's Healthy Request product was up 4.7% and is catching store brands, down 1.7%, for the second spot (16.9% vs. 13.9%). \$ SALES CHANGE VS. TOP VENDORS (MILLIONS) YEAR AGO SHARE Campbell Soup Co. \$1,297.7 -2.2% 82.3% Private label 265.9 -1.7 16.9 Pacific Foods of Oregon 3.3 32.4 0.2 Look's Gourmet Food Co. 2.4 8.1 0.2 Bay Valley Foods 1.7 3,865.5 0.1 UNIT SALES CHANGE VS. AVG. PRICE TOP VENDORS (MILLIONS) YEAR AGO PER UNIT Campbell Soup Co. 948.7 -4.1% \$1.37 Private label 277.7 -2.8 0.96 Pacific Foods of Oregon 1.3 32.0 2.61 Look's Gourmet Food Co. 0.6 6.3 3.81 Bay Valley Foods 1.4 2,270.1 1.26 \$ SALES CHANGE VS. TOP BRANDS (MILLIONS) YEAR AGO SHARE Campbell's \$1,038.5 -3.6% 65.9% Private label 265.9 -1.7 16.9 Campbell's Healthy Request 218.6 4.7 13.9 Campbell's Light 12.3 -2.5 0.8 Campbell's Disney Princess 9.5 3.4 0.6 Campbell's Super Mario 5.7 90.1 0.4 Campbell's Scooby Doo 4.9 -15.3 0.3 Pacific Natural Foods 3.3 39.6 0.2 Campbell's Disney Phineas Fb 3.1 -41.3 0.2 Campbell's Danny Phntm Nickldn 2.5 -21.2 0.2 CATEGORY TOTAL 1,576.6 -2.0 100.0 UNIT SALES CHANGE VS. AVG. PRICE TOP BRANDS (MILLIONS) YEAR AGO PER UNIT Campbell's 779.7 -5.3% \$1.33 Private label 277.7 -2.8 0.96 Campbell's Healthy Request 141.9 2.1 1.54 Campbell's Light 8.2 -3.0 1.50 Campbell's Disney Princess 6.4 2.7 1.50 Campbell's Super Mario 3.8 84.7 1.50 Campbell's Scooby Doo 3.2 -15.7 1.52 Pacific Natural Foods 1.3 42.6 2.61 Campbell's Disney Phineas Fb 2.0 -41.4 1.51 Campbell's Danny Phntm Nickldn 1.7 -22.2 1.48 CATEGORY TOTAL 1,232.2 -3.8 1.28 TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25. Source: IRI RTS WET SOUP Campbell's versus Progresso. Campbell's leads the top 10 brand battle five to three. Yet Progresso holds the top spot with 33.9% of dollars. Campbell's products garnered 43.6% of dollars to General Mills' (maker of Progresso) 40.6%. Category sales were down, 2.8% in dollars, 2.6% in units. \$ SALES CHANGE VS. TOP VENDORS (MILLIONS) YEAR AGO SHARE Campbell Soup Co. \$818.2 -4.2% 43.6% General Mills 761.1 -2.1 40.6 Private label 73.6 -2.4 3.9 ConAgra Foods 55.2 -17.7 2.9 Amy's Kitchen 49.9 13.6 2.7 UNIT SALES CHANGE VS. AVG. PRICE TOP VENDORS (MILLIONS) YEAR AGO PER UNIT Campbell Soup Co. 450.3 -3.0% \$1.82 General Mills 437.0 -1.9 1.74 Private label 40.7 -5.0 1.81 ConAgra Foods 26.6 -17.1 2.07 Amy's Kitchen 18.5 13.4 2.70 \$ SALES CHANGE VS. TOP BRANDS (MILLIONS) YEAR AGO SHARE Progresso \$635.0 -2.2% 33.9% Campbell's Chunky 426.4 -1.8 22.7 Campbell's Chunky Hlthy Rqst 122.4 -8.2 6.5 Campbell's Home Style 113.8 59.4 6.1 Progresso Light 102.6 -4.2 5.5 Private label 73.6 -2.4 3.9 Amy's 49.9 14.3 2.7 Healthy Choice 46.3 -18.0 2.5 Campbell's 44.1 14.3 2.4 Campbell's Soup On the Go 40.3 -6.1 2.2 CATEGORY TOTAL 1,875.5 -2.8 100.0 UNIT SALES CHANGE VS. AVG. PRICE TOP BRANDS (MILLIONS) YEAR AGO PER UNIT Progresso 363.4 -2.2% \$1.75 Campbell's Chunky 239.2 0.2 1.78 Campbell's Chunky Hlthy Rqst 70.0 -7.3 1.75 Campbell's Home Style 63.3 52.6 1.80 Progresso Light 60.2 -3.1 1.71 Private label 40.7 -5.0 1.8i Amy's 18.5 13.6 2.70 Healthy Choice 24.5 -14.8 1.89 Campbell's 24.8 14.3 1.78 Campbell's Soup On the Go 25.3 -5.2 1.59 CATEGORY TOTAL 1,015.4 -2.6 1.85 TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25. Source: IRI DRY SOUP An average price per unit of \$ 1.70 makes products in this category

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relatively inexpensive. Unilever, with three Lipton brands and its Knorr brand in the top 10 had 44.4% of dollars. Overall the category was relatively flat, up 0.3% in dollars, down 0.8% in units. \$ SALES CHANGE VS. TOP VENDORS (MILLIONS) YEAR AGO SHARE Unilever Bestfoods Nrth Amer \$163.2 -0.3% 44.4% Bear Creek Country Kitchens 62.1 0.9 16.9 Nong Shim Co. 27.2 19.9 7.4 Private label 26.6 -4.3 7.2 N.K. Hurst Co. 15.2 0.8 4.1 UNIT SALES CHANGE VS. AVG. PRICE TOP VENDORS (MILLIONS) YEAR AGO PER UNIT Unilever Bestfoods Nrth Amer 110.1 -1.2% \$1.48 Bear Creek Country Kitchens 17.3 -0.4 3.58 Nong Shim Co. 18.9 18.0 1.44 Private label 22.6 -4.2 1.18 N.K. Hurst Co. 5.7 0.3 2.66 \$ SALES CHANGE VS. TOP BRANDS (MILLIONS) YEAR AGO SHARE Lipton Recipe Secrets \$84.4 -0.8% 22.9% Bear Creek Country Kitchens 62.1 0.9 16.9 Lipton Soup Secrets 41.9 0.8 11.4 Private label 26.6 -4.3 7.2 Knorr 26.3 1.1 7.2 Nong Shim 25.5 18.5 6.9 Hurst's HamBeens 14.9 1.2 4.0 Wyler's Mrs. Grass 11.8 -5.7 3.2 Lipton Cup A Soup 10.5 -4.1 2.8 Shore Lunch 5.6 -10.0 1.5 CATEGORY TOTAL 367.6 0.3 100.0 UNIT SALES CHANGE VS. AVG. PRICE TOP BRANDS (MILLIONS) YEAR AGO PER UNIT Lipton Recipe Secrets 52.5 -2.3% \$1.61 Bear Creek Country Kitchens 17.3 -0.4 3.58 Lipton Soup Secrets 28.2 0.6 1.48 Private label 22.6 -4.2 1.18 Knorr 22.2 0.4 1.18 Nong Shim 17.9 18.0 1.43 Hurst's HamBeens 5.6 0.8 2.66 Wyler's Mrs. Grass 6.2 0.1 1.90 Lipton Cup A Soup 7.1 -4.4 1.47 Shore Lunch 1.6 -9.3 3.42 CATEGORY TOTAL 216.8 -0.8 1.70 TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25. Source: 1RI COOKING & SALAD OILS Top national vendor ConAgra Foods, down 12.3% in dollars for 14.3% share, lost ground to its main competitors J.M. Smucker Co. (up 3.8%, 13.8% share) ACH Food Cos. (up 3.5%, 10.7% share) and Ventura Foods (up 9.4%, 5.8% share). Private label led all with a 40.2% dollar share, down 6.7%. \$ SALES CHANGE VS. TOP VENDORS (MILLIONS) YEAR AGO SHARE Private label \$749.8 -6.7% 40.2% ConAgra Foods 266.3 -12.3 14.3 The J.M. Smucker Co. 258.1 3.8 13.8 ACH Food Cos. 199.1 3.5 10.7 Ventura Foods 107.3 9.4 5.8 UNIT SALES CHANGE VS. AVG. PRICE TOP VENDORS (MILLIONS) YEAR AGO PER UNIT Private label 198.5 -0.2% \$3.78 ConAgra Foods 57.1 -8.5 4.67 The J.M. Smucker Co. 70.3 17.8 3.67 ACH Food Cos. 38.0 8.1 5.24 Ventura Foods 17.1 16.0 6.27 \$ SALES CHANGE VS. TOP BRANDS (MILLIONS) YEAR AGO SHARE Private label \$749.8 -6.7% 40.2% Wesson 266.3 -12.3 14.3 Crisco 258.1 3.8 13.8 Mazola 175.6 3.7 9.4 Lou Ana 107.3 9.4 5.8 Spectrum Naturals 50.9 24.6 2.7 BetterBody Foods 23.2 218.5 1.2 123 23.0 -12.9 1.2 Pompeian OlivExtra 19.9 23.0 1.1 Smart Balance Omega 13.7 -15.6 0.7 CATEGORY TOTAL 1,865.5 -1.5 100.0 UNIT SALES CHANGE VS. AVG. PRICE TOP BRANDS (MILLIONS) YEAR AGO PER UNIT Private label 198.5 -0.2% \$3.78 Wesson 57.1 -8.5 4.67 Crisco 70.3 17.9 3.67 Mazola 31.5 9.0 5.58 Lou Ana 17.1 16.0 6.27 Spectrum Naturals 6.3 24.1 8.12 BetterBody Foods 2.0 146.4 11.53 123 9.3 -14.8 2.48 Pompeian OlivExtra 3.5 25.0 5.67 Smart Balance Omega 3.4 -15.8 4.05 CATEGORY TOTAL 431.2 1.7 4.33 TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25. Source: IRI OLIVE OIL After a year of solid growth, olive oil sales slowed, up only 1.4% in dollars compared to a previous increase of more than 5%. Overall, the category accounted for more than \$1 billion. Pompeian enjoyed the most growth among vendors, up 18.2%. Private label paced both vendors and brands with 29.6% dollar share. \$ SALES CHANGE VS. TOP VENDORS (MILLIONS) YEAR AGO SHARE Private label \$319.6 -0.1% 29.6% Med Foods 204.2 -5.8 18.9 Salov S P.A. 137.6 1.4 12.7 Pompeian 105.1 18.2 9.7 Colavita USA 39.8 2.7 3.7 UNIT SALES CHANGE VS. AVG. PRICE TOP VENDORS (MILLIONS) YEAR AGO PER UNIT Private label 49.9 1.2% \$6.41 Med Foods 21.7 -6.5 9.41 Salov S P.A. 17.5 4.3 7.87 Pompeian 15.8 11.8 6.67 Colavita USA 3.8 4.8 10.52 \$ SALES CHANGE VS. TOP BRANDS (MILLIONS) YEAR AGO SHARE Private label \$319.6 -0.1% 29.6% Bertolli 166.2 -3.9 15.4 Filippo Berio 137.4 1.5 12.7 Pompeian 104.9 18.8 9.7 Colavita 36.8 3.5 3.4 Star 31.0 -3.6 2.9 California Olive Ranch 29.2 45.1 2.7 Botticelli 23.9 -3.5 2.2 Bertolli Classico 15.5 -0.8 1.4 Olivari 13.8 31.9 1.3 CATEGORY TOTAL 1,080.8 1.4 100.0 UNIT SALES CHANGE VS. AVG. PRICE TOP BRANDS (MILLIONS) YEAR AGO PER UNIT Private label 49.9 1.2% \$6.41 Bertolli 17.9 -4.2 9.31 Filippo Berio 17.5 4.4 7.87 Pompeian 15.7 12.4 6.67 Colavita 3.3 5.1 11.13 Star 4.0 -6.3 7.74 California Olive Ranch 3.2 40.8 9.12 Botticelli 3.0 -7.3 8.02 Bertolli Classico 1.1 -2.3 13.68 Olivari 2.3 28.7 6.11 CATEGORY TOTAL 145.7 1.1 7.42 TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25. Source: IRI MICROWAVE BROWNING/PAN SPRAY Both dollar and units sales were relatively unchanged, up 0.9% and 0.1% respectively. ConAgra Foods and its Pam brand accounted for more than half of category sales. Private label was the only other brand with significant impact, capturing 34.7% of dollars. \$ SALES CHANGE VS. TOP VENDORS (MILLIONS) YEAR AGO SHARE ConAgra Foods \$178.3 -0.5%

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51.7% Private label 119.7 -0.9 34.7 The J.M. Smucker Co. 14.8 1.8 4.3 B & G Foods 11.0 -0.1 3.2 Boulder Brands 7.8 3.5 2.3 UNIT SALES CHANGE VS. AVG. PRICE TOP VENDORS (MILLIONS) YEAR AGO PER UNIT ConAgra Foods 55.4 -1.5% \$3.22 Private label 51.7 -0.8 2.31 The J.M. Smucker Co. 6.5 2.6 2.29 B & G Foods 4.9 -0.3 2.23 Boulder Brands 2.9 4.9 2.75 \$ SALES CHANGE VS. TOP BRANDS (MILLIONS) YEAR AGO SHARE Pam \$176.9 0.9% 51.3% Private label 119.7 -0.9 34.7 Crisco 13.8 4.0 4.0 Baker's Joy 10.1 1.7 2.9 Smart Balance Omega 5.5 -7.9 1.6 Spectrum 2.5 109.9 0.7 Smart Balance 2.3 45.7 0.7 Winona pure 1.9 4.9 0.6 Mazola 1.7 2.2 0.5 Pompeian 1.6 457.8 0.5 CATEGORY TOTAL 344.7 0.9 100.0 UNIT SALES CHANGE VS. AVG. PRICE TOP BRANDS (MILLIONS) YEAR AGO PER UNIT Pam 54.6 0.7% \$3.24 Private label 51.7 -0.8 2.31 Crisco 6.1 4.4 2.28 Baker's Joy 4.6 1.8 2.19 Smart Balance Omega 2.0 -6.5 2.75 Spectrum 0.4 113.1 5.55 Smart Balance 0.9 47.2 2.75 Winona pure 0.6 1.0 3.09 Mazola 0.8 5.0 2.21 Pompeian 0.3 404.5 4.98 CATEGORY TOTAL 125.0 0.1 2.76 TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25. Source: IRI CHEESE SNACKS Frito Lay just gets bigger and bigger. Buoyed by the Cheetos brand, up 7.1% in dollars for a 70.8% market share, Frito Lay generated more than \$1 billion, up 5% with more than 82% of the category. Baked Cheetos did particularly well, up 12.2% in dollars, 30.4% in units. \$ SALES CHANGE VS. TOP VENDORS (MILLIONS) YEAR AGO SHARE Frito Lay \$1,077.6 5.0% 82.4% Private label 47.1 5.6 3.6 Utz Quality Foods 43.3 -0.3 3.3 Wise Fods 21.2 -7.3 1.6 Herr Foods 15.2 1.5 1.2 UNIT SALES CHANGE VS. AVG. PRICE TOP VENDORS (MILLIONS) YEAR AGO PER UNIT Frito Lay 538.5 1.6% \$2.00 Private label 25.3 3.6 1.86 Utz Quality Foods 14.8 6.6 2.93 Wise Fods 15.1 -8.9 1.40 Herr Foods 9.4 1.1 1.62 \$ SALES CHANGE VS. TOP BRANDS (MILLIONS) YEAR AGO SHARE Cheetos \$926.4 7.1% 70.8% Chester's 67.1 -0.7 5.1 Private label 47.1 5.6 3.6 Utz 39.5 -3.9 3.0 Cheetos Mix Ups 31.2 -24.8 2.4 Baked Cheetos 27.4 12.2 2.1 Cheetos Simply 22.8 NA 1.7 Wise Cheez Doodles 20.6 -7.2 1.6 Herr's 15.0 1.6 1.1 Bachman Jax 11.3 11.6 0.9 CATEGORY TOTAL 1,307.9 4.3 100.0 UNIT SALES CHANGE VS. AVG. PRICE TOP BRANDS (MILLIONS) YEAR AGO PER UNIT Cheetos 474.4 2.7% \$1.95 Chester's 34.0 0.0 1.97 Private label 25.3 3.6 1.86 Utz 13.1 -1.7 3.01 Cheetos Mix Ups 13.1 -31.1 2.37 Baked Cheetos 9.4 30.4 2.92 Cheetos Simply 6.7 NA 3.39 Wise Cheez Doodles 14.8 -8.8 1.39 Herr's 9.3 0.5 1.61 Bachman Jax 4.8 10.1 2.33 CATEGORY TOTAL 657.1 1.5 1.99 TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25. Source: IRI ALL OTHER CRACKERS Sunshine's Cheez It brand was No. 1 with nearly 13% of dollars. However the top vendor was Mondelez, accounting for more than 32% of sales on the strength of its Nabisco brands (Ritz, Wheat Thins and Triscuits). Pepperidge Farms also did well with its Goldfish brand crackers. \$ SALES CHANGE VS. TOP VENDORS (MILLIONS) YEAR AGO SHARE Mondelez International 51,614.1 -0.8% 32.5% Sunshine Biscuits 766.1 5.2 15.4 Pepperidge Farm 746.8 1.0 15.0 Kellogg Co. 601.8 -4.0 12.1 Private label 234.5 -1.1 4.7 UNIT SALES CHANGE VS. AVG. PRICE TOP VENDORS (MILLIONS) YEAR AGO PER UNIT Mondelez International 605.0 0.3% \$2.67 Sunshine Biscuits 271.3 7.6 2.82 Pepperidge Farm 285.8 2.3 2.61 Kellogg Co. 208.4 -4.9 2.89 Private label 121.8 -2.4 1.92 \$ SALES CHANGE VS. TOP BRANDS (MILLIONS) YEAR AGO SHARE Sunshine Cheez It \$632.4 0.1% 12.7% Nabisco Ritz 500.6 -2.0 10.1 Pepperidge Farm Goldfish 459.6 4.5 9.3 Nabisco Wheat Thins 344.8 -8.1 6.9 Nabisco Triscuit 323.8 -8.1 6.5 Private label 234.5 -1.1 4.7 Stacy's 215.6 1.6 4.3 Keebler Club 214.3 3.2 4.3 Keebler Townhouse 212.0 19.2 4.3 Snack Factory **Pretzel Crisps** 176.8 8.1 3.6 CATEGORY TOTAL 4,967.0 0.9 100.0 UNIT SALES CHANGE VS. AVG. PRICE TOP BRANDS (MILLIONS) YEAR AGO PER UNIT Sunshine Cheez It 224.4 2.8% \$2.82 Nabisco Ritz 181.9 -2.8 2.75 Pepperidge Farm Goldfish 170.5 5.2 2.70 Nabisco Wheat Thins 126.2 -6.6 2.73 Nabisco Triscuit 122.6 -6.4 2.64 Private label 121.8 -2.4 1.92 Stacy's 64.0 2.4 3.37 Keebler Club 75.3 3.6 2.85 Keebler Townhouse 79.5 16.6 2.67 Snack Factory **Pretzel Crisps** 60.2 11.2 2.94 CATEGORY TOTAL 1,829.8 1.7 2.71 TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25. Source: IRI SNACK NUTS The health benefits of nuts are not lost on consumers. The category accounted for \$3.8 billion, up 2.8%. Units were up 1.5%. Kraft and its Planters brand had a strong year and were the top national vendor and brand, but store brands held the No. 1 spot overall. \$ SALES CHANGE VS. TOP VENDORS (MILLIONS) YEAR AGO SHARE Private label \$1,195.3 2.0% 31.2% Kraft Foods Group 1,011.1 5.0 26.4 Paramount Farms 560.0 0.8 14.6 Blue Diamond Growers 407.0 12.6 10.6 Diamond Foods 116.4 -4.7 3.0 UNIT SALES CHANGE VS. AVG. PRICE TOP VENDORS (MILLIONS) YEAR AGO PER UNIT Private label 286.6 4.0% \$4.17 Kraft Foods Group 191.0 6.5 5.29 Paramount Farms 92.6 -4.9 6.05 Blue Diamond Growers 79.6 2.0

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5.11 Diamond Foods 31.1 0.2 3.74 \$ SALES CHANGE VS. TOP BRANDS (MILLIONS) YEAR AGO SHARE Private label \$1,195.3 2.0% 31.2% Planters 932.1 7.5 24.3 Wonderful 559.9 1.4 14.6 Blue Diamond 407.0 12.6 10.6 Emerald 113.5 -4.5 3.0 Planters Nutrition 67.3 11.1 1.8 Hampton Farms 66.1 21.6 1.7 Young Pecan 38.4 -6.2 1.0 Imperial Nuts 24.3 -19.4 0.6 Frito Lay 21.3 18.4 0.6 CATEGORY TOTAL 3,828.8 2.8 100.0 UNIT SALES CHANGE VS. AVG. PRICE TOP BRANDS (MILLIONS) YEAR AGO PER UNIT Private label 286.6 4.0% \$4.17 Planters 177.7 9.5 5.24 Wonderful 92.6 -4.1 6.05 Blue Diamond 79.6 2.0 5.11 Emerald 30.8 0.6 3.68 Planters Nutrition 10.9 2.0 6.18 Hampton Farms 22.1 15.4 2.99 Young Pecan 2.9 -11.6 13.16 Imperial Nuts 8.5 -19.5 2.87 Frito Lay 12.1 16.1 1.76 CATEGORY TOTAL 885.9 1.5 4.32 TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25. Source: IRI GRANOLA BARS The health benefits of nuts are not lost on consumers. The category accounted for \$3.8 billion, up 2.8%. Units were up 1.5%. Kraft and its Planters brand had a strong year and were the top national vendor and brand, but store brands held the No. 1 spot overall. \$ SALES CHANGE VS. TOP VENDORS (MILLIONS) YEAR AGO SHARE General Mills \$622.1 -2.9% 39.1% Quaker Oats Co. 402.4 1.3 25.3 Private label 143.9 -12.5 9.1 Kashi Co. 106.2 9.5 6.7 McKee Foods Corp. 84.8 8.8 5.3 UNIT SALES CHANGE VS. AVG. PRICE TOP VENDORS (MILLIONS) YEAR AGO PER UNIT General Mills 176.2 -4.4% \$3.53 Quaker Oats Co. 139.3 -1.1 2.89 Private label 62.7 -12.4 2.29 Kashi Co. 31.7 6.1 3.35 McKee Foods Corp. 37.6 12.8 2.25 \$ SALES CHANGE VS. TOP BRANDS (MILLIONS) YEAR AGO SHARE Nature Valley \$387.3 -7.6% 24.4% Quaker Chewy 223.9 6.9 14.1 Nature Valley Sweet & Salty Nut 217.6 6.0 13.7 Private label 143.9 -12.5 9.1 Kashi 106.2 12.4 6.7 Quaker Chewy Dipps 95.4 -6.7 6.0 Sunbelt Bakery 83.9 8.8 5.3 Kind Healthy Grains 48.9 793.0 3.1 Quaker Big Chewy 37.9 35.7 2.4 Atkins Advantage 30.6 -0.1 1.9 CATEGORY TOTAL 1,589.2 -1.0 100.0 UNIT SALES CHANGE VS. AVG. PRICE TOP BRANDS (MILLIONS) YEAR AGO PER UNIT Nature Valley 105.7 -9.7% \$3.67 Quaker Chewy 73.6 5.0 3.04 Nature Valley Sweet & Salty Nut 64.4 5.0 3.38 Private label 62.7 -12.4 2.29 Kashi 31.7 9.1 3.35 Quaker Chewy Dipps 31.7 -11.1 3.01 Sunbelt Bakery 35.7 12.9 2.35 Kind Healthy Grains 14.7 847.0 3.32 Quaker Big Chewy 15.7 51.0 2.41 Atkins Advantage 4.1 0.0 7.50 CATEGORY TOTAL 518.2 -2.7 3.07 TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25 Source: IRI FLOUR General Mills and its Gold Medal brand held top spot with 24.7% of dollars. Store brands were a close second at 23.5%. Overall, category dollars were flat, down just 0.2%, while units were down 1.7%. Average price per unit increased 4-cents. \$ SALES CHANGE VS. TOP VENDORS (MILLIONS) YEAR AGO SHARE General Mills \$180.6 -5.1% 25.8% Private label 164.6 -5.4 23.5 The J.M. Smucker Co. 103.1 -0.3 14.7 King Arthur Flour Co. 69.6 5.2 9.9 Bob's Red Mill Natural Foods 46.3 17.1 6.6 UNIT SALES CHANGE VS. AVG. PRICE TOP VENDORS (MILLIONS) YEAR AGO PER UNIT General Mills 69.1 -5.6% \$2.61 Private label 77.8 -3.6 2.11 The J.M. Smucker Co. 40.7 0.1 2.53 King Arthur Flour Co. 16.1 5.6 4.31 Bob's Red Mill Natural Foods 7.4 12.0 6.23 \$ SALES CHANGE VS. TOP BRANDS (MILLIONS) YEAR AGO SHARE Gold Medal \$172.7 -5.7% 24.7% Private label 164.6 -5.4 23.5 King Arthur Flour 69.6 5.2 9.9 Pillsbury Best 59.1 2.4 8.5 Bob's Red Mill 46.3 17.1 6.6 White Lily 22.3 -3.4 3.2 Maseca 21.1 4.1 3.0 White Wings 13.8 1.3 2.0 Swan's Down 11.1 -1.0 1.6 Blue Bird 8.4 22.4 1.2 CATEGORY TOTAL 699.7 -0.2 100.0 UNIT SALES CHANGE VS. AVG. PRICE TOP BRANDS (MILLIONS) YEAR AGO PER UNIT Gold Medal 66.4 -6.1% \$2.60 Private label 77.8 -3.6 2.11 King Arthur Flour 16.1 5.6 4.31 Pillsbury Best 23.5 2.4 2.51 Bob's Red Mill 7.4 12.1 6.24 White Lily 8.8 -1.6 2.51 Maseca 4.8 7.4 4.33 White Wings 2.8 0.5 4.81 Swan's Down 3.5 -4.0 3.10 Blue Bird 1.2 29.0 6.95 CATEGORY TOTAL 248.7 -1.7 2.81 TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25 Source: IRI SPICE/SEASONING-NO SALT/PEPPER Three of the top four brands were from category leader McCormick (33.6% dollar share). Private label was second with a 14.7% dollar share. The biggest brand gainer was Badia, up 16.3%. category sales totaled \$2.2 billion, up 3.6%. Units were up 3.4%. \$ SALES CHANGE VS. TOP VENDORS (MILLIONS) YEAR AGO SHARE McCormick & Co. \$741.3 1.4% 33.6% Private label 324.0 0.7 14.7 ACH Food Cos. 174.0 3.3 7.9 B & G Foods 82.5 -1.9 3.7 Goya Foods 74.3 3.6 3.4 UNIT SALES CHANGE VS. AVG. PRICE TOP VENDORS (MILLIONS) YEAR AGO PER UNIT McCormick & Co. 248.9 4.7% \$2.98 Private label 151.3 -1.3 2.14 ACH Food Cos. 46.4 1.2 3.75 B & G Foods 27.5 -2.8 3.00 Goya Foods 36.4 4.8 2.04 \$ SALES CHANGE VS. TOP BRANDS (MILLIONS) YEAR AGO SHARE McCormick \$415.5 -1.7% 18.9% Private label 324.0 0.7 14.7 McCormick Gourmet Collctn 120.7 -1.5 5.5 McCormick Grill Mates 100.5 3.2 4.6 Badia 69.2 16.3 3.1 Tones 67.7 0.2 3.1 Mrs. Dash 59.9 0.3 2.7 Spice Islands 58.0 0.6 2.6 Spice World 51.1 3.3 2.3

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Sazon Goya 45.8 4.0 2.1 CATEGORY TOTAL 2,203.9 3.6 100.0 UNIT SALES CHANGE VS. AVG. PRICE TOP BRANDS (MILLIONS) YEAR AGO PER UNIT McCormick 115.7 -2.9% \$3.59 Private label 151.3 -1.3 2.14 McCormick Gourmet Collectn 23.3 0.4 5.17 McCormick Grill Mates 37.7 0.2 2.66 Badia 31.7 14.9 2.18 Tones 17.8 -2.5 3.81 Mrs. Dash 20.9 -1.2 2.86 Spice Islands 10.9 -1.3 5.34 Spice World 17.5 -0.4 2.92 Sazon Goya 22.7 5.7 2.02 CATEGORY TOTAL 823.5 3.4 2.68 TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25. Source: IRI ICE CREAM Blue Bell was the only national brand with double-digit dollar share (11.3%), second to private label (21.3%). Brands three through five, Haagen-Dazs, Breyers and Ben & Jerry's, were separated by only 0.6%. Talenti enjoyed a big year, up 77.2%. Overall, category dollars were up 3.1% while units were up 1.2%. \$ SALES CHANGE VS. TOP VENDORS (MILLIONS) YEAR AGO SHARE Private label \$1,069.4 -2.6% 21.3% Nestle Dreyers Ice Cream Co. 927.5 -3.3 18.5 Blue Bell Creameries 570.0 5.6 11.3 Good Humor/Breyers 478.1 6.2 9.5 Ben & Jerry's Homemade 389.0 15.3 7.7 UNIT SALES CHANGE VS. AVG. PRICE TOP VENDORS (MILLIONS) YEAR AGO PER UNIT Private label 331.6 -3.0% \$3.23 Nestle Dreyers Ice Cream Co. 238.3 -3.7 3.89 Blue Bell Creameries 130.7 0.2 4.36 Good Humor/Breyers 129.0 1.9 3.71 Ben & Jerry's Homemade 100.7 12.6 3.86 \$ SALES CHANGE VS. TOP BRANDS (MILLIONS) YEAR AGO SHARE Private label \$1,069.4 -2.6% 21.3% Blue Bell 570.0 5.6 11.3 Haagen-Dazs 382.2 4.5 7.6 Breyers 356.8 -5.1 7.1 Ben & Jerry's 349.9 3.7 7.0 Dreyer's/Edy's Slowchurned 263.4 -8.5 5.2 Dreyer's/Edy's Grand 232.6 -8.1 4.6 Turkey Hill 218.9 11.9 4.4 Talenti 164.9 77.2 3.3 Wells Blue Bunny 163.3 -32.6 3.2 CATEGORY TOTAL 5,026.2 3.1 100.0 UNIT SALES CHANGE VS. AVG. PRICE TOP BRANDS (MILLIONS) YEAR AGO PER UNIT Private label 331.6 -3.0% \$3.23 Blue Bell 130.7 0.2 4.36 Haagen-Dazs 93.2 3.9 4.10 Breyers 99.2 -6.3 3.59 Ben & Jerry's 90.5 1.2 3.87 Dreyer's/Edy's Slowchurned 69.2 -8.0 3.81 Dreyer's/Edy's Grand 62.5 -7.8 3.72 Turkey Hill 75.1 12.1 2.91 Talenti 37.7 74.2 4.37 Wells Blue Bunny 41.5 -26.4 3.93 CATEGORY TOTAL 1,351.1 1.2 3.72 TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25. Source: IRI FZ YUGUKT/TOFU Dannon Oikos made its way into the top 10, debuting at seven with more than \$16 million in sales, 5.1% market share. Top selling national brand Kemps did well, up 10.3% in dollars, as did No.2 So Delicious, up a more impressive 28.6%. Overall, the category was off, about 10% in both dollars and units. \$ SALES CHANGE VS. TOP VENDORS (MILLIONS) YEAR AGO SHARE Private label \$64.3 -1.6% 20.2% Ben & Jerry's Homemade 39.2 -26.9 12.3 Kemps 37.4 9.0 11.7 Turtle Mountain 36.1 16.8 11.3 Wells Enterprises 26.7 -30.8 8.4 UNIT SALES CHANGE VS. AVG. PRICE TOP VENDORS (MILLIONS) YEAR AGO PER UNIT Private label 21.2 -1.7% \$3.02 Ben & Jerry's Homemade 10.4 -30.5 3.78 Kemps 10.0 10.3 3.73 Turtle Mountain 6.9 18.5 5.20 Wells Enterprises 7.1 -34.4 3.75 \$ SALES CHANGE VS. TOP BRANDS (MILLIONS) YEAR AGO SHARE Private label \$64.3 -1.6% 20.2% Kemps 34.5 10.3 10.8 So Delicious 26.5 28.6 8.3 Ben & Jerry's FroYo 23.4 -1.6 7.3 Wells Blue Bunny 23.0 1.8 7.2 Healthy Choice 22.8 -37.3 7.1 Dannon Oikos 16.2 23,963.7 5.1 Ben & Jerry's 15.8 -47.0 5.0 Dreyer's/Edy's Slowchurned 10.8 -27.3 3.4 Haagen-Dazs 9.1 -7.4 2.9 CATEGORY TOTAL 318.8 -9.5 100.0 UNIT SALES CHANGE VS. AVG. PRICE TOP BRANDS (MILLIONS) YEAR AGO PER UNIT Private label 21.2 -1.7% \$3.02 Kemps 9.3 11.7 3.72 So Delicious 5.1 30.7 5.15 Ben & Jerry's FroYo 6.1 -2.9 3.86 Wells Blue Bunny 5.9 2.6 3.89 Healthy Choice 6.3 -41.8 3.59 Dannon Oikos 5.0 26461.6 3.25 Ben & Jerry's 4.3 -50.4 3.68 Dreyer's/Edy's Slowchurned 2.8 -26.4 3.90 Haagen-Dazs 2.3 -7.8 4.00 CATEGORY TOTAL 86.8 -11.1 3.67 TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25. Source: IRI SHERBET/SORBET/ICES Talenti was the big winner with a dollars increase of 54.4% and sales that reached nearly \$10 million. Blue Bell also fared well, up 9.9%. Leading national brand Haagen-Dazs had an off year, but still captured almost 14% of dollar sales. Private label still controls the category with more than 40% of dollars, though down 9%. \$ SALES CHANGE VS. TOP VENDORS (MILLIONS) YEAR AGO SHARE Private label \$80.9 -9.0% 41.9% Nestle Dreyers Ice Cream Co. 33.8 -9.0 17.5 Blue Bell Creameries 14.9 9.9 7.7 Talenti 9.8 54.4 5.1 Prairie Farms Dairy 6.2 5.5 3.2 UNIT SALES CHANGE VS. AVG. PRICE TOP VENDORS (MILLIONS) YEAR AGO PER UNIT Private label 31.7 -9.8% \$2.55 Nestle Dreyers Ice Cream Co. 8.6 -9.2 3.94 Blue Bell Creameries 5.2 4.2 2.89 Talenti 2.2 52.0 4.40 Prairie Farms Dairy 1.9 5.3 3.24 \$ SALES CHANGE VS. TOP BRANDS (MILLIONS) YEAR AGO SHARE Private label \$80.9 -9.0% 41.9% Haagen-Dazs 26.8 -5.2 13.9 Blue Bell 14.9 9.9 7.7 Talenti 9.8 54.4 5.1 Prairie Farms 6.2 5.6 3.2 Kemps 6.0 -7.7 3.1 WholeFruit 4.3 -9.4 2.2 Dean's Country Fresh 4.0 0.8 2.1 Dreyer's/Edys 3.9 -22.7 2.0 Ciao Bella 3.4 -40.1 1.7 CATEGORY TOTAL 193.2 -5.5 100.0 UNIT SALES CHANGE

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VS. AVG. PRICE TOP BRANDS (MILLIONS) YEAR AGO PER UNIT Private label 31.7 -9.8% \$2.55 Haagen-Dazs 6.8 -5.4 3.94 Blue Bell 5.2 4.2 2.89 Talenti 2.2 52.0 4.40 Prairie Farms 1.9 5.3 3.23 Kemps 2.0 -9.3 3.05 WholeFruit 1.5 -11.9 2.85 Dean's Country Fresh 1.6 -3.6 2.58 Dreyer's/Edys 1.0 -23.4 3.89 Ciao Bella 0.8 -43.4 4.36 CATEGORY TOTAL 66.2 -7.0 2.92 TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25. Source: IRI FROZEN PIZZA CRUSTS/DOUGH After double-digit growth the year prior, sales flattened. However, most national brands did well including Udi's, up 11.5% in dollars for 24.7% market share, trailing only private label. Other brands that did well were Stefano's, Tiseo and Against the Grain Gourmet. \$ SALES CHANGE VS. TOP VENDORS (MILLIONS) YEAR AGO SHARE Private label \$5.7 -5.2% 27.2% Boulder Brands 5.1 11.5 24.7 Kinnikinnick Foods 1.4 -0.7 6.9 Stefano Foods 1.2 18.3 6.0 Score Tuesday 0.9 11.8 4.4 UNIT SALES CHANGE VS. AVG. PRICE TOP VENDORS (MILLIONS) YEAR AGO PER UNIT Private label 2.0 -3.9% \$2.83 Boulder Brands 1.0 14.3 5.04 Kinnikinnick Foods 0.2 0.3 8.05 Stefano Foods 0.6 15.7 1.99 Score Tuesday 0.5 5.3 1.89 \$ SALES CHANGE VS. TOP BRANDS (MILLIONS) YEAR AGO SHARE Private label \$5.7 -5.2% 27.2% Udi's 5.1 11.5 24.7 Kinnikinnick Foods 1.4 -0.7 6.9 Stefano's 1.2 18.3 6.0 Tiseo 0.9 11.8 4.4 Against the Grain Gourmet 0.8 54.8 3.7 Calise & Sons Bakery 0.7 9.5 3.3 Guttenplans 0.7 5.7 3.3 House of Pasta 0.6 -12.8 2.8 Original Pizza of Boston 0.4 22.5 2.0 CATEGORY TOTAL 20.8 0.3 100.0 UNIT SALES CHANGE VS. AVG. PRICE TOP BRANDS (MILLIONS) YEAR AGO PER UNIT Private label 2.0 -3.9% \$2.83 Udi's 1.0 14.3 5.04 Kinnikinnick Foods 0.2 0.3 8.05 Stefano's 0.6 15.7 1.99 Tiseo 0.5 5.3 1.89 Against the Grain Gourmet 0.1 52.4 7.28 Calise & Sons Bakery 0.4 7.8 1.52 Guttenplans 0.6 7.4 1.22 House of Pasta 0.2 -15.2 2.77 Original Pizza of Boston 0.2 23.8 2.37 CATEGORY TOTAL 7.0 -0.6 2.95 TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25. Source: IRI FROZEN PIZZA Di Giorno remained the No. 1 brand with dollars more than double No. 2, private label. Totino's Party Pizza, Red Baron and Tombstone round out the top five brands. Nestle was the top vendor, garnering 43.6% of dollars. Overall the category was flat in dollars, down 2.9% in units. \$ SALES CHANGE VS. TOP VENDORS (MILLIONS) YEAR AGO SHARE Nestle USA \$1,907.6 -5.4% 43.6% Schwan Food Co. 898.8 2.7 20.5 Private label 463.7 5.0 10.6 General Mills 409.2 6.6 9.3 Bernatello's Pizza 78.7 24.7 1.8 UNIT SALES CHANGE VS. AVG. PRICE TOP VENDORS (MILLIONS) YEAR AGO PER UNIT Nestle USA 435.2 -7.5% \$4.38 Schwan Food Co. 246.8 -5.5 3.64 Private label 147.8 1.6 3.14 General Mills 304.5 4.3 1.34 Bernatello's Pizza 20.6 4.5 3.83 \$ SALES CHANGE VS. TOP BRANDS (MILLIONS) YEAR AGO SHARE Di Giorno \$957.3 -7.7% 21.9% Private label 463.7 5.0 10.6 Totino's Party Pizza 387.7 7.2 8.9 Red Baron 380.3 2.7 8.7 Tombstone 308.9 -0.5 7.1 Freschetta 222.7 19.9 5.1 Jack's 194.3 63.2 4.4 Red Baron Singles 152.6 6.6 3.5 California Pizza Kitchen 138.4 1.9 3.2 Di Giorno Pizzeria 89.2 9.3 2.0 CATEGORY TOTAL 4,377.1 0.0 100.0 UNIT SALES CHANGE VS. AVG. PRICE TOP BRANDS (MILLIONS) YEAR AGO PER UNIT Di Giorno 170.4 -9.4% \$5.62 Private label 147.8 1.6 3.14 Totino's Party Pizza 286.7 5.3 1.35 Red Baron 105.8 -0.3 3.59 Tombstone 83.3 -2.1 3.71 Freschetta 42.7 15.7 5.21 Jack's 63.4 61.6 3.07 Red Baron Singles 44.3 7.0 3.45 California Pizza Kitchen 26.2 -2.0 5.27 Di Giorno Pizzeria 15.6 5.4 5.73 CATEGORY TOTAL 1,342.7 -2.9 3.26 TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25. Source: IRI REFRIGERATED BACON Bacon sales are sizzling. Dollar sales are up 7.2%, climbing past the \$4 billion mark. Unit sales are also up a healthy 3.2%. Private label is the top selling vendor and brand. Of the national brands, Oscar Mayer is No. 1 followed by Hormel Black label. The biggest gainer was Smithfield, up 34.6%. \$ SALES CHANGE VS. TOP VENDORS (MILLIONS) YEAR AGO SHARE Private label \$948.9 11.9% 21.6% Kraft Foods Group 904.0 4.4 20.6 Hormel Foods 485.3 0.1 11.1 Wright Brand Foods 341.0 5.5 7.8 Smithfield 228.0 35.8 5.2 UNIT SALES CHANGE VS. AVG. PRICE TOP VENDORS (MILLIONS) YEAR AGO PER UNIT Private label 207.9 6.8% \$4.56 Kraft Foods Group 181.5 1.3 4.98 Hormel Foods 83.0 -7.0 5.85 Wright Brand Foods 32.6 -1.6 10.47 Smithfield 53.7 32.8 4.24 \$ SALES CHANGE VS. TOP BRANDS (MILLIONS) YEAR AGO SHARE Private label \$948.9 11.9% 21.6% Oscar Mayer 854.8 2.6 19.5 Hormel Black Label 366.3 0.7 8.3 Wright 334.1 4.9 7.6 Smithfield 210.0 34.6 4.8 Farmland 207.2 7.2 4.7 Gwaltney 96.1 -5.5 2.2 Hormel 92.8 -1.3 2.1 BarS 87.4 -16.3 2.0 Butterball Everyday 71.6 3.8 1.6 CATEGORY TOTAL 4,387.8 7.2 100.0 UNIT SALES CHANGE VS. AVG. PRICE TOP BRANDS (MILLIONS) YEAR AGO PER UNIT Private label 207.9 6.8% \$4.56 Oscar Mayer 169.7 -1.4 5.04 Hormel Black Label 60.0 -6.9 6.10 Wright 32.2 -2.0 10.36 Smithfield 47.5 31.2 4.42 Farmland 44.7 4.4 4.63 Gwaltney 25.2 -3.2 3.81 Hormel 18.5 -7.1 5.01 BarS 23.8 -21.9 3.68 Butterball Everyday 32.5 2.7 2.20 CATEGORY TOTAL 926.7

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3.2 4.73 TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25. Source: IRI BROWN/POWDER/FLAVORED SUGAR Just about half the category belongs to private label (49%), though that was down 6.5% for the year. The top national brand was Domino with 24.3% of dollars, flat for the year. C&H Brown was the only other brand with significant market share, 14.6%, down 2.1%. \$ SALES CHANGE VS. TOP VENDORS (MILLIONS) YEAR AGO SHARE Private label \$187.2 -6.5% 49.0% Domino Foods 92.9 0.0 24.3 C & H Sugar Co. 55.8 -2.0 14.6 Imperial Sugar Co. 20.0 5.1 5.2 Amer Crystal Sugar Co. 6.5 0.3 1.7 UNIT SALES CHANGE VS. AVG. PRICE TOP VENDORS (MILLIONS) YEAR AGO PER UNIT Private label 111.0 -2.5% \$1.69 Domino Foods 55.6 -1.9 1.67 C & H Sugar Co. 29.2 -1.4 1.91 Imperial Sugar Co. 13.3 9.8 1.50 Amer Crystal Sugar Co. 3.3 3.4 1.95 \$ SALES CHANGE VS. TOP BRANDS (MILLIONS) YEAR AGO SHARE Private label \$187.2 -6.5% 49.0% Domino 92.9 0.0 24.3 C&H 55.7 -2.1 14.6 Imperial Sugar 10.2 3.6 2.7 Dixie Crystals 9.5 6.9 2.5 Florida Crystals 5.8 11.2 1.5 Crystal Sugar 4.4 -0.7 1.2 American Crystal 2.0 2.3 0.5 Wholesome Sweeteners 1.7 43.6 0.5 Batey 1.7 8.2 0.5 CATEGORY TOTAL 382.2 -2.7 100.0 UNIT SALES CHANGE VS. AVG. PRICE TOP BRANDS (MILLIONS) YEAR AGO PER UNIT Private label 111.0 -2.5% \$1.69 Domino 55.6 -1.9 1.67 C&H 29.2 -1.4 1.91 Imperial Sugar 6.3 7.5 1.61 Dixie Crystals 6.9 12.3 1.39 Florida Crystals 1.6 11.2 3.63 Crystal Sugar 2.2 2.8 1.96 American Crystal 1.0 4.7 1.94 Wholesome Sweeteners .3 46.2 4.43 Batey .4 9.3 4.10 CATEGORY TOTAL 220.5 -0.9 1.73 TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25. Source: IRI CANNED/BOTTLED CORN Del Monte Foods was the top national vendor with 24.8% of dollar sales on the strength of three brands in the top 10. Senaca Foods' Libby's had a good year, up 10% in dollars. Overall category dollars were down 2.3%, units down 0.2%. \$ SALES CHANGE VS. TOP VENDORS (MILLIONS) YEAR AGO SHARE Private label \$227.2 -2.1% 36.4% Del Monte Foods 154.9 -8.0 24.8 General Mills 102.9 -2.1 16.5 Seneca Foods Corp. 50.5 11.3 8.1 Juanita's Foods 25.5 6.0 4.1 UNIT SALES CHANGE VS. AVG. PRICE TOP VENDORS (MILLIONS) YEAR AGO PER UNIT Private label 332.0 -2.8% \$0.68 Del Monte Foods 136.6 2.1 1.13 General Mills 87.8 -6.5 1.17 Seneca Foods Corp. 67.2 27.3 0.75 Juanita's Foods 10.5 4.7 2.42 \$ SALES CHANGE VS. TOP BRANDS (MILLIONS) YEAR AGO SHARE Private label \$227.2 -2.1% 36.4% Del Monte Fresh Cut 106.9 -5.2 17.1 Green Giant 88.8 -2.4 14.2 Libby's 44.7 10.0 7.2 Del Monte 35.2 7.8 5.6 Juanita's 21.1 8.8 3.4 Bush's Best 13.9 4.3 2.2 Green Giant Mexicorn 9.3 -9.3 1.5 Del Monte Fresh Cut Specialties 8.0 -53.3 1.3 Teasdale 6.8 -3.8 1.1 CATEGORY TOTAL 624.5 -2.3 100.0 UNIT SALES CHANGE VS. AVG. PRICE TOP BRANDS (MILLIONS) YEAR AGO PER UNIT Private label 332.0 -2.8% \$0.68 Del Monte Fresh Cut 114.8 4.2 0.93 Green Giant 79.3 -7.0 1.12 Libby's 60.6 26.9 0.74 Del Monte 11.8 65.4 2.98 Juanita's 7.5 9.0 2.81 Bush's Best 8.3 3.7 1.67 Green Giant Mexicorn 6.1 -10.9 1.53 Del Monte Fresh Cut Specialties 5.3 -53.3 1.50 Teasdale 2.9 -2.5 2.34 CATEGORY TOTAL 687.2 -0.2 0.91 TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25. Source: IRI CANNED/BOTTLED GREEN BEANS The Green Giant w as jolly, up a healthy 15% in dollars for General Mills. Del Monte Fresh Cut was the top national brand with 21.1% of dollars, trailing private label (36.3%). The category generated more than \$600 million, down 1.6%. Units were up 0.7%. \$ SALES CHANGE VS. TOP VENDORS (MILLIONS) YEAR AGO SHARE Private label \$218.9 -1.7% 36.3% Del Monte Foods 203.9 -6.4 33.8 General Mills 54.5 11.9 9.0 Seneca Foods Corp. 44.5 5.7 7.4 Allens 27.4 -7.6 4.5 UNIT SALES CHANGE VS. AVG. PRICE TOP VENDORS (MILLIONS) YEAR AGO PER UNIT Private label 310.8 -2.6% \$0.70 Del Monte Foods 165.3 4.2 1.23 General Mills 50.3 -3.7 1.08 Seneca Foods Corp. 59.7 24.0 0.75 Allens 17.2 -19.2 1.59 \$ SALES CHANGE VS. TOP BRANDS (MILLIONS) YEAR AGO SHARE Private label \$218.9 -1.7% 36.3% Del Monte Fresh Cut 127.0 -10.5 21.1 Del Monte 55.9 4.8 9.3 Green Giant 44.0 15.0 7.3 Libby's 39.0 5.1 6.5 The Allens 23.3 -4.8 3.9 Hanover 18.2 4.5 3.0 Del Monte Fresh Cut Specialties 17.4 -23.3 2.9 Glory foods 11.0 10.3 1.8 Green Giant Kitchen Sliced 9.8 -3.4 1.6 CATEGORY TOTAL 602.8 -1.6 100.0 UNIT SALES CHANGE VS. AVG. PRICE TOP BRANDS (MILLIONS) YEAR AGO PER UNIT Private label 310.8 -2.6% \$0.70 Del Monte Fresh Cut 133.8 1.6 0.95 Del Monte 18.6 53.7 3.01 Green Giant 38.8 -3.7 1.13 Libby's 53.9 25.0 0.72 The Allens 12.8 -16.2 1.82 Hanover 8.4 4.9 2.17 Del Monte Fresh Cut Specialties 11.5 -22.8 1.51 Glory foods 5.7 16.6 \$1.95 Green Giant Kitchen Sliced 10.9 -5.9 0.89 CATEGORY TOTAL 644.9 0.7 0.93 TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25. Source: IRI BAGELS/BIALYS It was a strong year for No. 1 brand Thomas. The Orograin Bakeries brand was up

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7.2% in dollars, capturing nearly half of all category sales. Udi's also performed well, up 22.4%. Overall the category was up 1.9% in dollars, 3.8% units. \$ SALES CHANGE VS. TOP VENDORS (MILLIONS) YEAR AGO SHARE Orograin Bakeries Products \$519.3 4.3% 60.7% Private label 133.9 4.4 15.6 EarthGrains Baking Cos. 79.4 -11.1 9.3 Pepperidge Farm 24.4 -12.6 2.9 Flowers Foods Bakeries 21.9 -11.1 2.6 UNIT SALES CHANGE VS. AVG. PRICE TOP VENDORS (MILLIONS) YEAR AGO PER UNIT Orograin Bakeries Products 160.7 5.5% \$3.23 Private label 62.2 6.3 2.15 EarthGrains Baking Cos. 28.1 -5.1 2.82 Pepperidge Farm 5.9 -11.7 4.11 Flowers Foods Bakeries 8.1 -7.4 2.71 \$ SALES CHANGE VS. TOP BRANDS (MILLIONS) YEAR AGO SHARE Thomas \$419.6 7.2% 49.0% Private label 133.9 4.4 15.6 Sara Lee 75.4 -10.0 8.8 Thomas Bagel Thins 73.6 -2.6 8.6 Thomas Hearty Grains 25.7 -11.8 3.0 Nature's Own 21.9 -10.9 2.6 Pepperidge Farm Mini 13.2 -3.2 1.5 Udi's 11.8 22.4 1.4 Pepperidge Farm 11.2 -21.5 1.3 Franz 11.0 5.9 1.3 CATEGORY TOTAL 856.0 1.9 100.0 UNIT SALES CHANGE VS. AVG. PRICE TOP BRANDS (MILLIONS) YEAR AGO PER UNIT Thomas 128.5 8.1% \$3.26 Private label 62.2 6.3 2.15 Sara Lee 26.9 -4.2 2.80 Thomas Bagel Thins 24.3 -0.3 3.03 Thomas Hearty Grains 7.7 -11.0 3.33 Nature's Own 8.1 -7.2 2.71 Pepperidge Farm Mini 3.2 -2.3 4.09 Udi's 2.2 21.7 5.45 Pepperidge Farm 2.7 -20.8 4.14 Franz 4.8 5.1 2.29 CATEGORY TOTAL 295.0 3.8 2.90 TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25. Source: IRI FRESH BREAD Fresh bread is one of the top selling categories in the store with sales approaching \$9 billion. Store brands were the only one to reach double-digits, with 23.9% of dollar sales. Pepperidge Farm had a good year with two of its brands showing solid growth. \$ SALES CHANGE VS. TOP VENDORS (MILLIONS) YEAR AGO SHARE Private label \$2,138.8 -3.7% 23.9% Flowers Foods Bakeries 1,519.1 6.9 17.0 EarthGrains Baking Cos. 819.4 -5.0 9.2 Bimbo Bakeries USA 691.1 -0.1 7.7 Pepperidge Farm 665.3 1.3 7.4 UNIT SALES CHANGE VS. AVG. PRICE TOP VENDORS (MILLIONS) YEAR AGO PER UNIT Private label 1,395.2 -2.0% \$1.53 Flowers Foods Bakeries 569.9 8.3 2.67 EarthGrains Baking Cos. 328.4 -2.2 2.50 Bimbo Bakeries USA 240.4 1.1 2.88 Pepperidge Farm 197.0 1.3 3.38 \$ SALES CHANGE VS. TOP BRANDS (MILLIONS) YEAR AGO SHARE Private label \$2,138.8 -3.7% 23.9% Nature's Own 838.7 -1.9 9.4 Brownberry 369.8 -10.3 4.1 Sara Lee 336.5 0.2 3.8 Oroweat 331.4 -4.3 3.7 Pepperidge Farm 215.9 4.8 2.4 Sunbeam 185.3 -8.1 2.1 Pepperidge Farm Swirl 172.6 -0.9 1.9 Pepperidge Farm Farmhouse 131.6 8.2 1.5 Mrs. Baird's 112.3 -7.2 1.3 CATEGORY TOTAL 8,942.3 -0.8 100.0 UNIT SALES CHANGE VS. AVG. PRICE TOP BRANDS (MILLIONS) YEAR AGO PER UNIT Private label 1,395.2 -2.0% \$1.53 Nature's Own 302.6 -1.4 2.77 Brownberry 129.6 -9.7 2.85 Sara Lee 137.8 4.1 2.44 Oroweat 95.6 -4.2 3.47 Pepperidge Farm 64.1 5.4 3.37 Sunbeam 74.5 -9.6 2.49 Pepperidge Farm Swirl 52.6 -0.7 3.28 Pepperidge Farm Farmhouse 40.1 9.0 3.28 Mrs. Baird's 49.4 -5.2 2.27 CATEGORY TOTAL 3,899.6 -0.3 2.29 TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25. Source: IRI DOUGHNUTS Doughnuts remain popular with consumers. Category dollars were up 7%, units up 7.6%. Hostess Donettes rebounded nicely, nearly doubling dollar sales, for a 10.7% market share, good for 5th best selling brand. Tastykake also had a strong year, up 18.4% in dollars. \$ SALES CHANGE VS. TOP VENDORS (MILLIONS) YEAR AGO SHARE Private label \$330.1 7.5% 26.4% Bimbo Bakeries USA 288.8 -1.3 23.1 Krispy Kreme Doughnut Co. 163.3 -1.2 13.1 McKee Foods Corp. 143.1 12.3 11.4 Hostess Brands 133.9 99.3 10.7 UNIT SALES CHANGE VS. AVG. PRICE TOP VENDORS (MILLIONS) YEAR AGO PER UNIT Private label 117.5 -0.9% \$2.81 Bimbo Bakeries USA 92.9 -1.4 3.11 Krispy Kreme Doughnut Co. 39.1 -4.7 4.18 McKee Foods Corp. 84.4 8.2 1.70 Hostess Brands 74.4 102.1 1.80 \$ SALES CHANGE VS. TOP BRANDS (MILLIONS) YEAR AGO SHARE Private label \$330.1 7.5% 26.4% Entenmann's 174.0 -0.2 13.9 Krispy Kreme 153.6 -0.9 12.3 Little Debbie 142.4 11.8 11.4 Hostess Donettes 133.8 99.6 10.7 Tastykake 59.4 18.4 4.7 Entenmann's Soltees 56.7 -0.9 4.5 Entenmann's Popems 37.1 -0.6 3.0 Duchess 18.0 -12.9 1.4 Nobrand 13.9 -0.9 1.1 CATEGORY TOTAL 1,250.1 7.0 100.0 UNIT SALES CHANGE VS. AVG. PRICE TOP BRANDS (MILLIONS) YEAR AGO PER UNIT Private label 117.5 -0.9% \$2.81 Entenmann's 55.4 -0.2 3.14 Krispy Kreme 35.9 -4.0 4.27 Little Debbie 84.1 7.8 1.69 Hostess Donettes 74.4 102.5 1.80 Tastykake 32.4 26.2 1.83 Entenmann's Soltees 14.1 -1.3 4.02 Entenmann's Popems 12.5 -1.0 2.98 Duchess 3.7 -20.6 4.92 Nobrand 4.5 -0.7 3.12 CATEGORY TOTAL 486.2 7.6 2.57 TOTAL U.S. SALES THROUGH SUPERMARKETS, DRUGSTORES, MASS MARKET RETAILERS, MILITARY COMMISSARIES AND SELECT CLUB AND DOLLAR CHAINS FOR THE 52 WEEKS ENDED JANUARY 25. Source: IRI

The stat pool: the grocery headquarters annual State of the Industry Almanac takes a comprehensive look at dozens of supermarket categories.(STATE OF THE INDUST....

Load-Date: August 30, 2018

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Lauren's Un-Perfect Life

Redbook

April 1, 2015

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Section: LIFE; Pg. 104; Vol. 224

Length: 2103 words

Byline: Amy Spencer

Luke Ritchie

Body

She's stylish, successful, and newly, happily married. But she is also completely and refreshingly chill about what doesn't go her way. And since she's willing to talk about pretty much anything, we let you guys ask the questions. Here we go

Lauren Conrad has the battle scars of a lifestyle guru who likes to get her hands dirty. Take the burn mark on her right wrist after an unfortunate encounter with a hot oven rack. "It's so stupid," she says, shaking her head. "I was experimenting with a cake, whether it was better to candy blood oranges before using them as decoration or just slice them and put them on it fresh." (For the record, fresh is the way to go.) She also has little cuts on her ankles from wearing a favorite pair of Louboutin flats with tiny spiky grommets. "They're really comfortable," she says, laughing. "I just cut my ankles sometimes." We're sitting in the Los Angeles headquarters of her fashion line Paper Crown, and as I begin to compliment the lovely decorations-delicate pink-and-white paper flowers-Lauren sets me straight. "It took us, like, *six hours* to make those things," she says. "I thought it was going to be a really quick project. And then I started and was like, I'm going to *finish* this."

Unlike the other celebrity lifestyle gurus of this world-ones who recommend steaming their lady parts or feature impossibly lush dinner party tablescapes photographed with moody Instagram filters-it's a relief to hear Lauren, 29, share an all-too-relatable tale of D.I.Y. PTSD. She doesn't even attempt a veneer of perfection. She doesn't have the time. Besides her Paper Crown line, which she started in 2010 and has now expanded to bridesmaids' dresses and stationery, Lauren has her hugely successful line for Kohl's, LC Lauren Conrad. She also recently launched The Little Market, an online retailer that sells handmade fair-trade goods from woman artisans around the world. Plus, Lauren is editor-in-chief of her website, <http://www.laurenconrad.com>, which receives 3.6 million unique views a month. Sound exhausting? It is. Tonight Lauren plans on cracking open a bottle of bubbles to celebrate the fact that Paper Crown shipped its first line of bridesmaids' dresses, but what she really needs, she says, is a nap.

And she's just as candid about her September 2014 marriage to William Tell, a 35-year-old who works in entertainment law. Like an old married lady, she speaks about him with a mixture of admiration and affectionate sarcasm. The pair met in 2011, and Lauren says she knew he was "the one" soon after. "He's the first person I ever thought I could marry," she says. "He's so smart. I respect his opinion a lot." (Though there are exceptions: "I watch *The Good Wife* with him, and he's like, 'That's incorrect. You would actually do this! It's a nightmare!'") Lauren says there are no immediate plans to start a family, but she's thinking about it, which is why she's planning on taking his name, at least personally. "I feel like it makes you a family unit," she says.

Because we know she has legions of fans (not to mention 3.3 *million* Twitter followers), we asked you, our REDBOOK readers, what you are dying to know from her. You didn't let us down with your smart, thoughtful

Lauren's Un-Perfect Life

questions, and Lauren's responses were equally straight. Listen to what keeps her motivated, how she handles her online trolls, and why she dresses like Ronald Reagan. Really.

Let's start with an easy reader question. Megan Ferren of New York City says: I love the focus on healthy living on your site. What do you like to snack on?

I'm obsessed with Inner Peas, the little Trader Joe's crunchy snack peas. But I've also been trying to eat fresh fruits and vegetables as a snack. I've been so busy over the weekends and missing farmers' markets that I signed up for a delivery service of locally grown stuff. That's not to say I'm not having pretzel parties-I like those **pretzel crisps**.

Ashley from San Francisco wants to know: What is your main source of decor inspiration?

Flea markets. The last thing I bought let me show you a picture! [Pulls up a photo on her iPhone] We're redoing our backyard, and I was trying to figure out what type of chairs to put there. I was on Pinterest and I saw a picture of these Bertoia side chairs. Because I'm clueless, I didn't realize it's a designer chair. When I went to find them, I discovered they are around \$700 each. For a *chair!* So I was at the flea market and I got a whole set for basically less than what one new one would be.

Sabrina Irsay of Austin, TX, says: Your decor style is ultrafeminine. How do you incorporate your new husband's personality and style into your home?

Excellent question. We are still working on it. We've been decorating a home together-we have a place in Laguna; it's our little escape. But we're so different. So I think it's just going to end up *eclectic*? I'll give him a photo and be like, "This is what I want to do." And if he says, "I don't hate it," then I'm allowed.

Why, what's his taste?

Modern or midcentury. More masculine, cleaner lines, heavier pieces. But he does have a large portrait of Elvis, and it's painted on velvet. It's called "Velvis" and it's hanging in our garage. Because *compromise!* [Laughs]

It feels like you're testing out different things all the time-like writing novels or collaborating on new things. How do you know when it's time to try something new?

I love change-standing still for too long terrifies me. That's why I'm in the fashion industry: You create a collection and start over again. Nobody loves their job all the time, but you should enjoy parts of it. Writing my last book, I wanted to kill myself for a month-it was the craziest deadline. I hadn't slept. I was so upset. Everything was the worst, but I kept telling myself it was temporary. It was terrible, but in a good way. I'm happiest when I'm working toward something.

When you're in business meetings, do you find that women have to be super-assertive to be heard?

I don't think so. Over the last few years I've been able to work with several women who I really respected because they didn't take on that role of being a bitch. They were strong, but they were kind and they didn't need to shout to be heard. A lot of women feel like they need to be really tough in order to be taken seriously. A lot of times we have this idea that kindness is weakness, which I don't think is true.

You're involved in so much; you must have crazy to-do lists. What kinds of things are you likely to leave undone?

Honestly, I keep lists in order to get thoughts out of my head; otherwise I can't quiet it. So I've started bringing a notebook with me. And at night when I'm going to bed, I can put it all in writing. It kills me when I'm driving. Because I commute a lot to L.A. from Orange County, which is a two-hour drive, I've been really into podcasts. I listened to *Serial* in two days, because I'm crazy. And have you heard *Invisibilia*? It's about things you can't see, like emotions. Today I listened to an episode on fear. It taught me you can actually train yourself to not be afraid of things, because [a lot of] fear is taught.

What are you most afraid of?

Lauren's Un-Perfect Life

I'm a very jumpy person. For example, my husband has to whistle before he walks in a room to let me know he's coming. A lot of times in public, people will come up behind me and grab my arm to get my attention. It's not an aggressive thing, but it terrifies me. I spook easily.

Let's get back to the reader questions. Here's Karen Morgan of New Jersey: What has been the most surprising thing about married life?

I don't have a great answer, because it hasn't felt different. William and I lived together before we married and knew early on that we were going to spend our lives together.

How is your relationship with William different from your past relationships?

I was never a person who was obsessed with the idea of marriage. I mean, I love weddings. But for me, other parts of a relationship are so much more important. For us it was obvious pretty quickly. He told me about the night he decided. We were stuck in traffic, on our way to a dinner, so we ended up being in the car for two and a half hours. We just had, like, a long talk of, "This is what our life would look like." We're planners. *[Laughs]*

I think it's funny that some people *don't* do that.

Obviously romance is so exciting and so is the thrill of committing yourself to someone forever. But you wake up the day after the wedding and you're *married*. And you have the rest of your lives ahead of you.

What do you guys bicker about?

Everything. It can be the smallest thing, like the way to pronounce a word. It's really funny: He's a lawyer, and I love to argue. One of my favorite things about him is that he's not afraid to disagree with me. And we both insist on being right. He's so smart, and he's often right. And if I am wrong, I have no problem with it.

Do you feel pressure to start a family?

No, we don't. I had a girlfriend who did this thing that I thought was so smart: The year she was going to get pregnant she made a checklist of things she wanted to do. One of them was, like, "Take a road trip across the country." She checked them all off, and then she was like, "Okay, I'm ready to be a mom." I was telling William that, and he was like, "You'd hate a road trip! You're terrible in the car!"

Alecia Pace of Long Island, NY, wondered this: Do you ever find that pleasing your fans or shutting up haters gets in the way of your creativity?

Every once in a while, yes. Because I'm human, and when someone says something mean about me, it hurts my feelings. That's natural. That said, I take everything with a grain of salt. People interact so differently when they don't have anonymity to make them brave. It would hurt my feelings more if someone were to say it to my face.

How do you get through tough or challenging times?

If I'm really stressed-out or upset at something, I always just try to focus on the positive. I think the best thing to do is count your blessings. There is so much good still there. It's really the only thing that makes me feel better.

Okay, we got a lot of questions about your beauty routine. Jackson Pearce of Atlanta asks: If you could wish for anything beauty-wise, what would it be?

I would love a bold lipstick that was natural. I've been trying to trade out my products for more natural ones. Your skin is your biggest organ-also, I've read that you can eat a pound of lipstick a year. But if you want to do a bold red or a hot pink lip, you can't get a long-lasting one that's all-natural. That's the magic product I would make.

When you're just hanging around the house, what are you wearing? Jessica Jalowiec of San Diego wants to know if you even own ugly pajamas.

Lauren's Un-Perfect Life

Absolutely. They're the most comfortable! The other day I was wearing a pair of gray, cropped, high-waisted sweatpants with a white T-shirt. William looked at me and said, "You look like President Reagan." I looked it up and found a photo of [Reagan] reading, and he's wearing these sweatpants pulled up really high with a white T-shirt on. I was like, "I *do* look like President Reagan!"

Ha! How often does your husband make references that you have to look up?

Daily. Google is the third member of our relationship.

Let's talk about your hair: How long were you considering cutting it before you made the leap?

A few months. I didn't want to touch it before the wedding. My hairstylist took a week to really cut it. She cut a lob and then a bob, and then she kept cutting it shorter. She wanted to teach me how to style it when it was growing out.

Oh, that's a good idea!

Now I want my long hair back. I don't like feeling bare.

Really? This leads me to our last question:

When do you feel most confident?

The girls who work on the website and I have been trying to do one charity event a month. We've done a meal at a women's center downtown and we're working with the children's hospital to set up a craft day. When I'm doing something selfless, that's when I feel best.

"I like constantly working and being creative," says Lauren, who is collaborating with Rifle Paper Co. on a line of stationery and gifts. The pretty wreath illustration, at left, is from her line!

"I still haven't fully accepted my fame," says Lauren. "But as I get older, I'm realizing it doesn't matter as much as I thought it did."

"I think some women have an idea that kindness is weakness, which isn't true."

Lauren and William at their wedding last September.

"One of my favorite things about William is that he's not afraid to disagree with me."

"I definitely wouldn't encourage my child to do reality television," says Lauren.

Load-Date: May 1, 2015

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United Airlines Updates United Clubs

Entertainment Close-up

March 14, 2015 Saturday

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Length: 451 words

Body

United Airlines reported it is transforming the customer experience in its United Clubs with upgrades including an overhauled, complimentary food menu launching this week, club renovations and a hospitality-focused approach to customer service.

"We're making major changes in our United Clubs to give our customers the elevated, hospitality-centric service and experience they deserve and expect. This year will be transformational," said Jimmy Samartzis, vice president of customer experience. "Our new fresh, tasty and healthy food offerings, overhauled service approach, and systematic investment in renovating the rest of our 49 clubs worldwide will give our customers an airport getaway for relaxing or being productive during the hustle and bustle of their travel day."

According to a media release, United will launch an all-new complimentary food menu in its United Clubs - from a Greek yogurt bar and hot oatmeal station to hummus with **pretzel crisps** and peppers. The menu is focused on freshness, variety and quality. United is replacing all current offerings with the new healthy and delicious choices, beginning with Chicago O'Hare International Airport this week.

The new items will be available at United Clubs in Houston, Denver, Newark, Los Angeles, San Francisco and Washington Dulles by the end of summer. All United Clubs worldwide will feature the new food by the end of the year.

Also in 2015, United will launch an upgraded beverage-for-sale program of premium wines, beers and spirits including Champagne Laurent-Perrier and Trinchero Family Estates Wines. United plans to test a new food-for-sale pilot program later this year as well.

In the coming year, the airline will renovate clubs in Chicago O'Hare, Washington Reagan, Hong Kong and Tokyo Narita. It will also build new clubs in Atlanta and San Francisco, and begin major changes in Los Angeles.

Each lounge will reflect the new, modern style with upgraded amenities showcased in the airline's Chicago O'Hare, Boston, London Heathrow, San Diego and Seattle United Club renovations.

United will re-train its United Club agents with a new customer service program throughout 2015. The training will reflect standards of the hotel and hospitality industry to better match club members' expectations. United Club members will also enjoy complimentary, Wi-Fi-based printing for greater customer productivity this year.

United Airlines Updates United Clubs

United Club members enjoy an airport oasis to recharge and relax in more than 45 locations worldwide.

United Airlines and United Express operate an average of 5,055 flights a day to 373 airports across six continents.

More Information:

<http://www.united.com>

((Comments on this story may be sent to newsdesk@closeupmedia.com))

Load-Date: March 14, 2015

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March 11, 2015, Snyder's-Lance Adds Cape Cod, Snack Factory Pretzel Crisps, Eatsmart Naturals and Lance to its Product Lineup

S&P DAILY NEWS

March 13, 2015

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Section: Contracts

Length: 91 words

Body

Snyder's-Lance, Inc. has expanded its portfolio of gluten-free snacks with the addition of Cape Cod, Snack Factory **Pretzel Crisps**, Eatsmart Naturals and Lance to its product lineup. To meet consumers' increasing demand for gluten-free options, Cape Cod, Snack Factory **Pretzel Crisps**, Eatsmart Naturals and Lance all have new certified gluten-free snacks being rolled out currently and are already on shelves at many retailers nationwide. A new gluten-free sandwich cracker is being presented to retailers this week for a spring introduction.

Load-Date: March 13, 2015

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Snyder's-Lance expands portfolio of gluten-free snacks

MarketLine NewsWire (Formerly Datamonitor)

March 11, 2015 Wednesday 2:05 AM GMT

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Section: FOOD

Length: 415 words

Highlight: Snyder's-Lance, Inc. has expanded its portfolio of gluten-free snacks with the addition of Cape Cod, Snack Factory **Pretzel Crisps**, Eatsmart Naturals and Lance to its product lineup.

Body

To meet consumers' increasing demand for gluten-free options, Cape Cod, Snack Factory **Pretzel Crisps**, Eatsmart Naturals and Lance all have new certified gluten-free snacks being rolled out currently and are already on shelves at many retailers nationwide. A new gluten-free sandwich cracker is being presented to retailers this week for a spring introduction. "As our family of brands continues to grow and reach more consumers who want healthier snack options, we've developed innovative, gluten-free snacks that will exceed consumer expectations in taste and quality," said Carl E. Lee, Jr., President and CEO of Snyder's-Lance, Inc.

"All of these products reflect our passion for premium, differentiated snacking." The new gluten-free options by Snyder's-Lance include: Cape Cod embraces consumers' desire for healthier options and their love for eating dips by creating new gluten-free Dipping Shells packed with whole grains. The shells come in three varieties - Four Bean (Black, Pinto, Red and Adzuki Beans), Blue Corn Multigrain (Blue Corn, Chia Seeds and Brown Rice) and Ancient Grain (Quinoa, Black Sesame and Amaranth). **Pretzel Crisps**, the world's first flat baked pretzel cracker, introduces new gluten-free Minis, inspired by demand for wholesome, bite-sized snacking options that all the family can enjoy. The minis debut in two flavorful varieties, Original and Salted Caramel. Eatsmart Naturals' new Sea Salt and Lime Dipping Chips offer a mouthwatering blend of potato and chickpea flavors. The chips are certified gluten-free, a good source of whole grains and made with GMO-free ingredients. Lance will introduce the first gluten-free sandwich cracker for consumers who desire savory, on-the-go fuel for the day. The gluten-free Peanut Butter and Cheddar Cheese Sandwich Crackers combine the great Lance taste in a bite-sized snack. This is a major gluten-free product breakthrough as Snyder's-Lance is the first company to pioneer this important innovation. "With improved taste and nutrition profiles, gluten-free foods are now appealing to an even wider audience, and in fact, snacks are the largest and fastest growing gluten-free food segment," said Rod Troni, Chief Marketing Officer, Snyder's-Lance, Inc. "That's why Snyder's-Lance is committed to offering more gluten-free options to consumers who desire them because of a gluten sensitivity or just because they deem them healthier. We have proven success in gluten-free snacking and will continue to raise the bar."

Load-Date: March 17, 2015

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